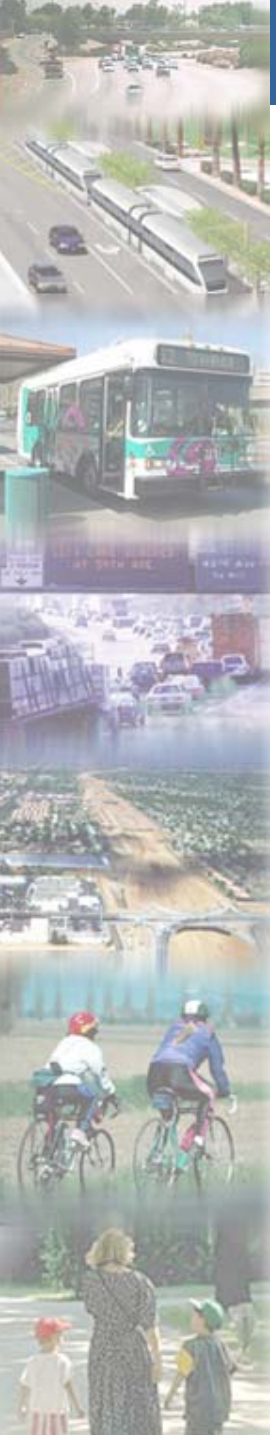
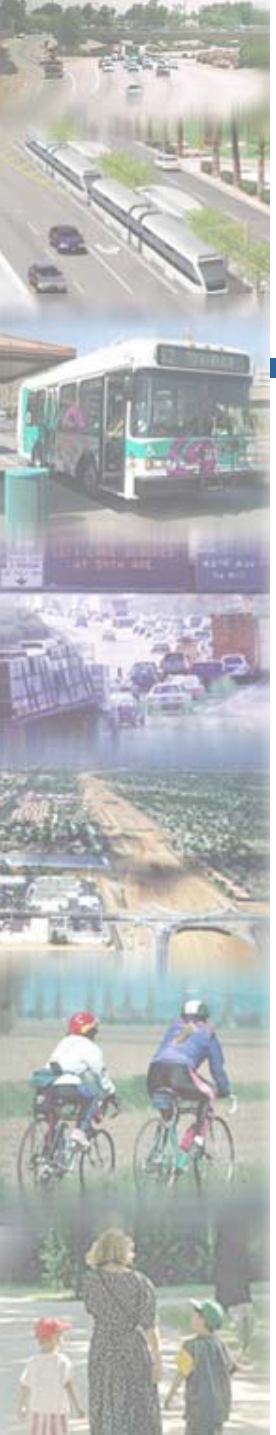


View of the Valley…

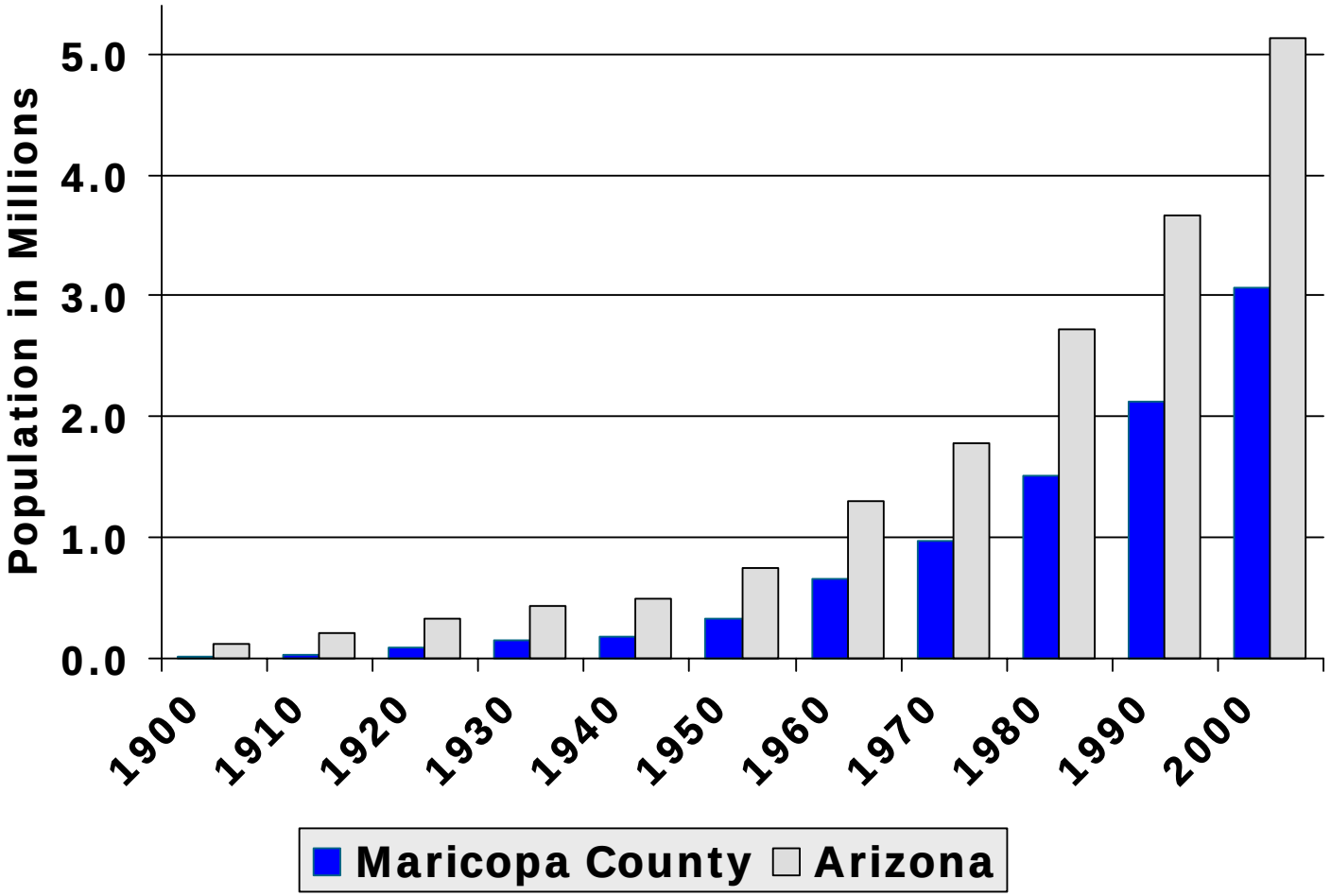
For the times they are a-changin'.

Bob Dylan - 1964

MARICOPA ASSOCIATION of GOVERNMENTS



Population Growth in Arizona and Maricopa County



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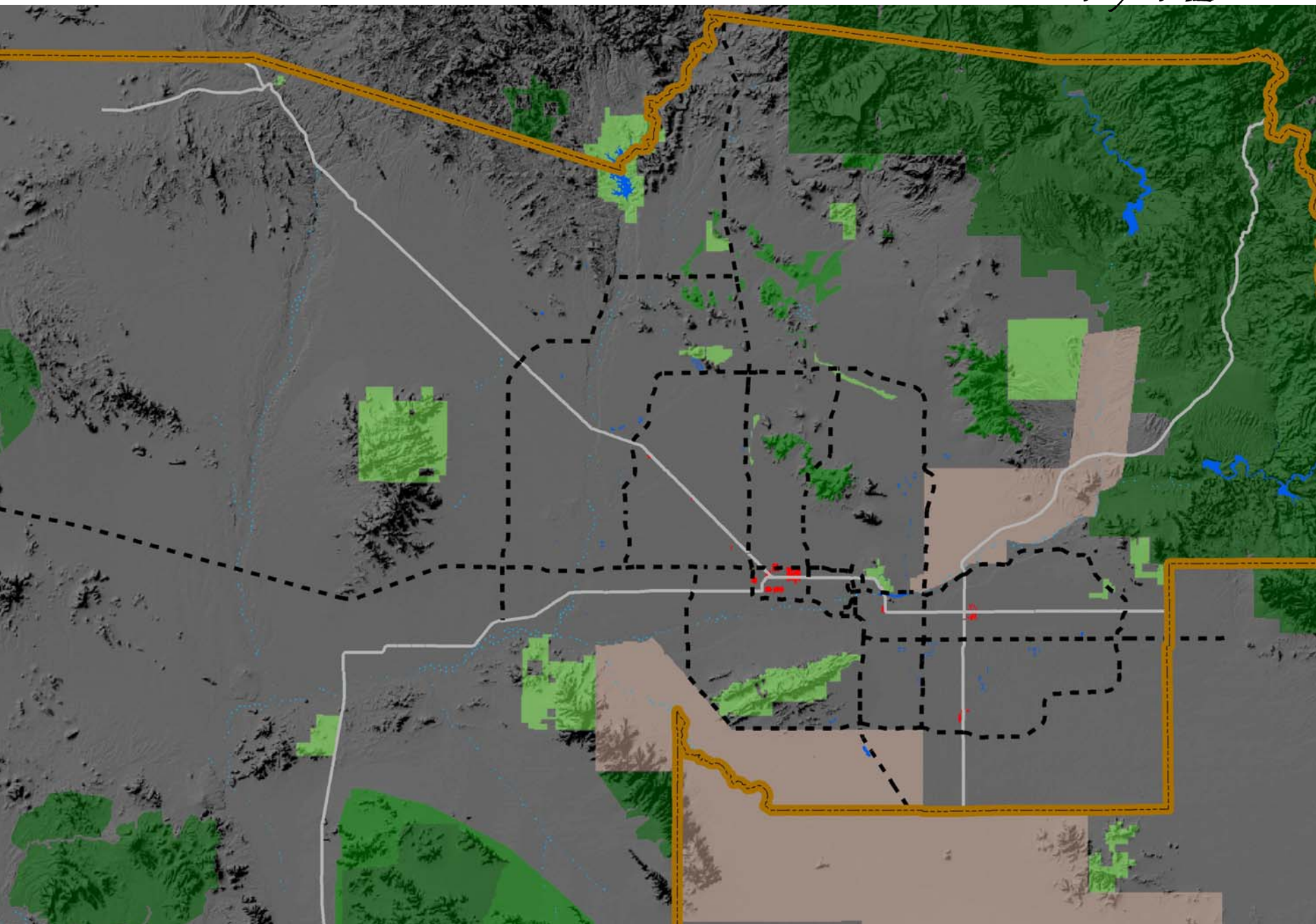

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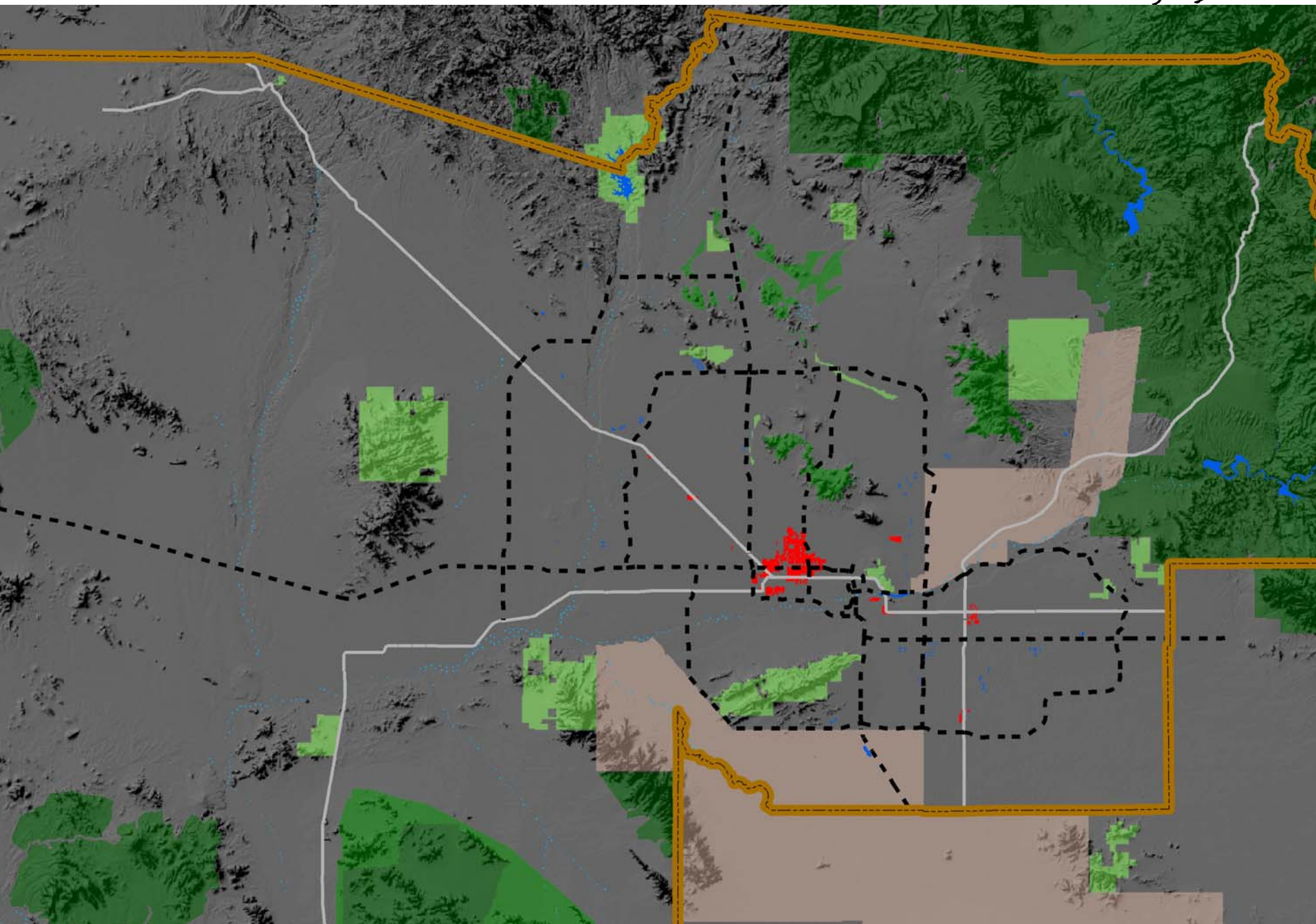

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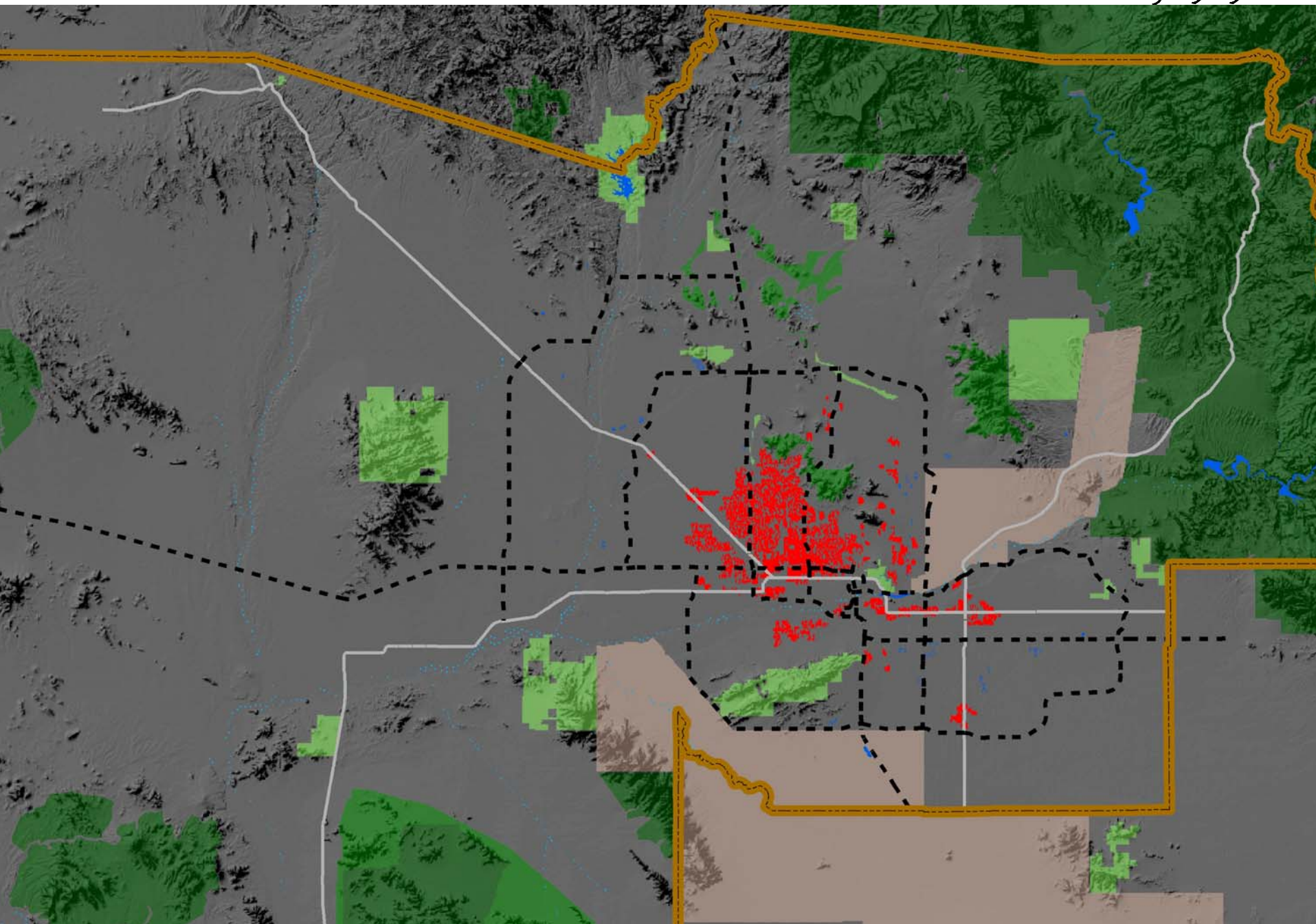

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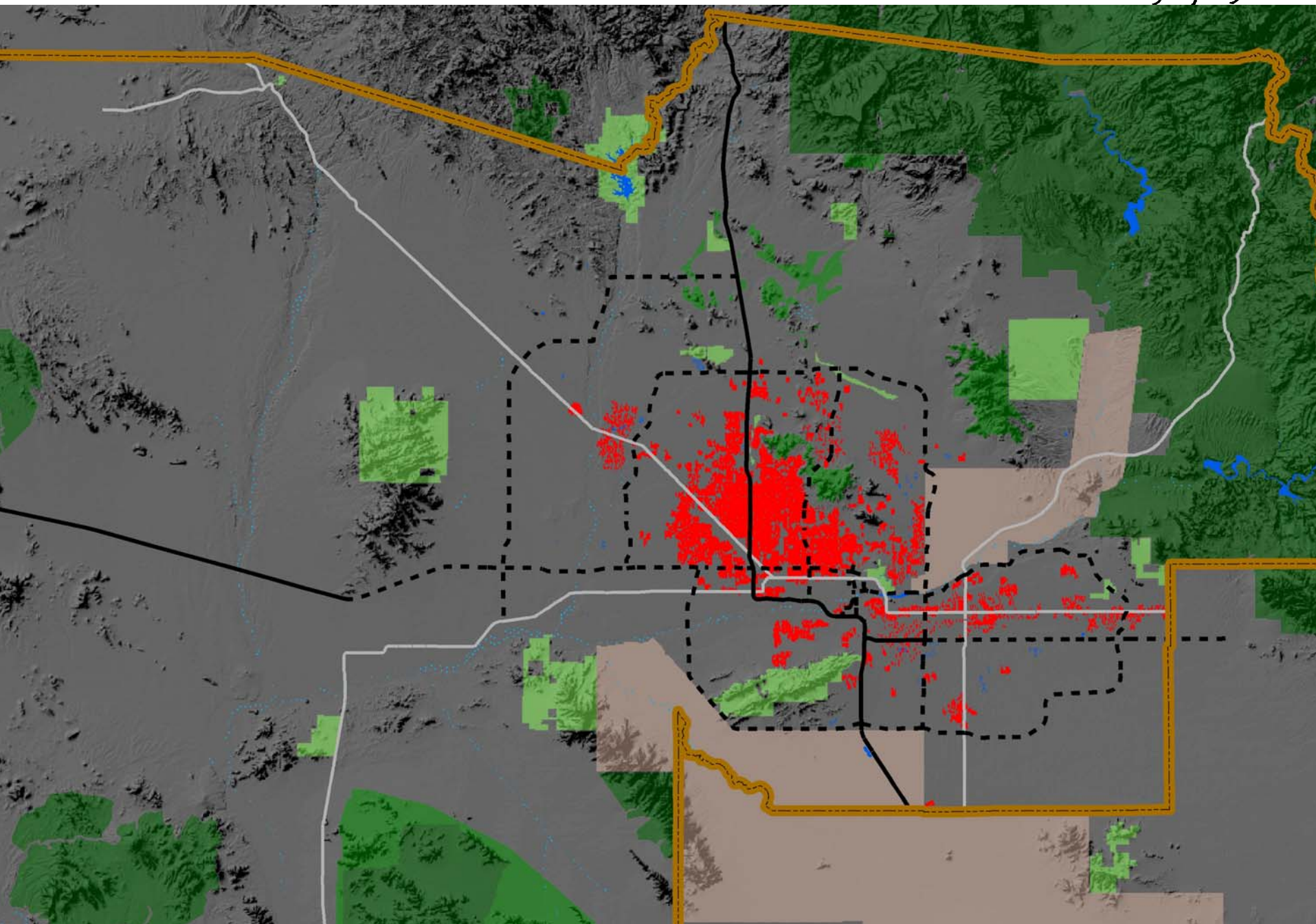

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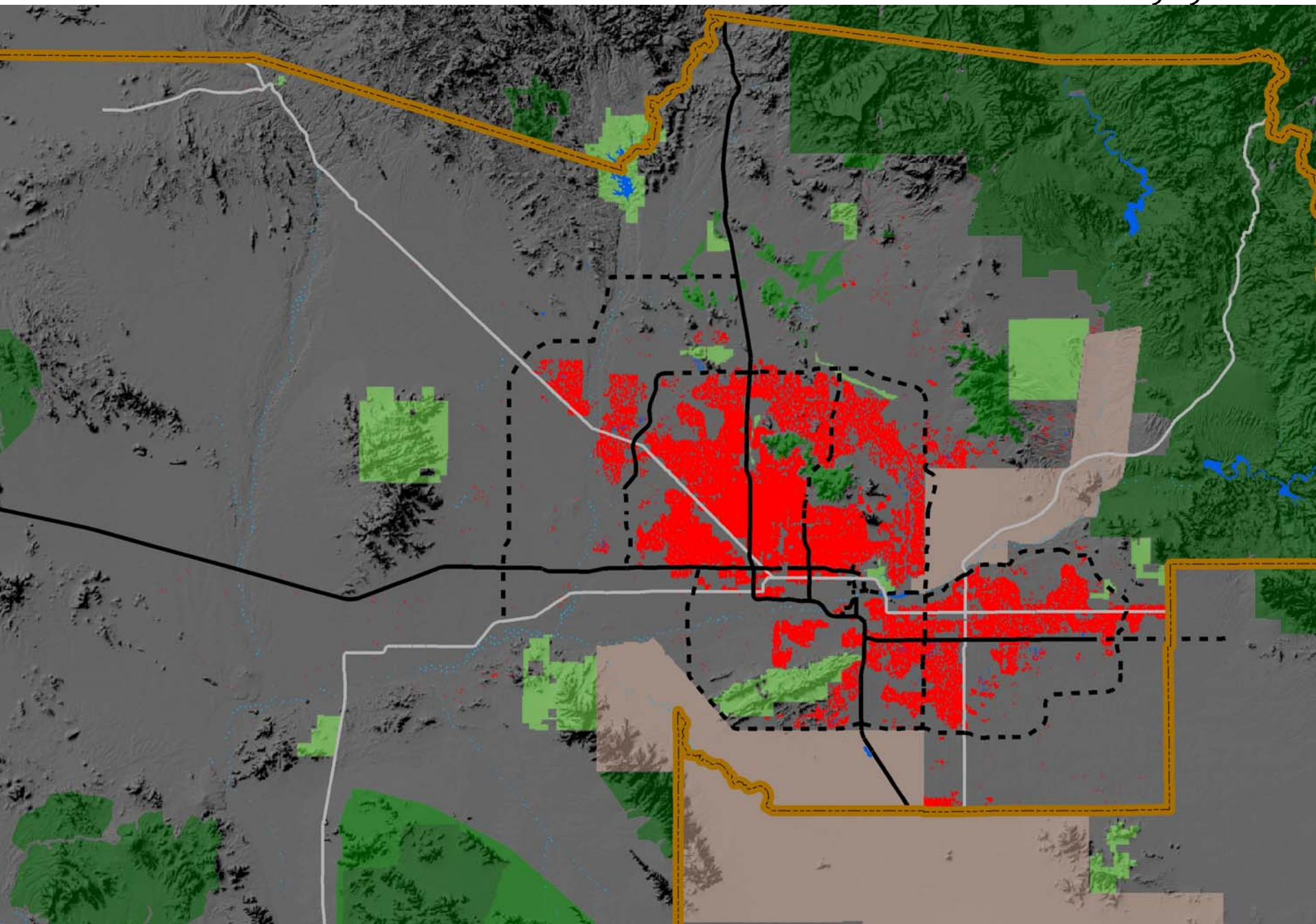

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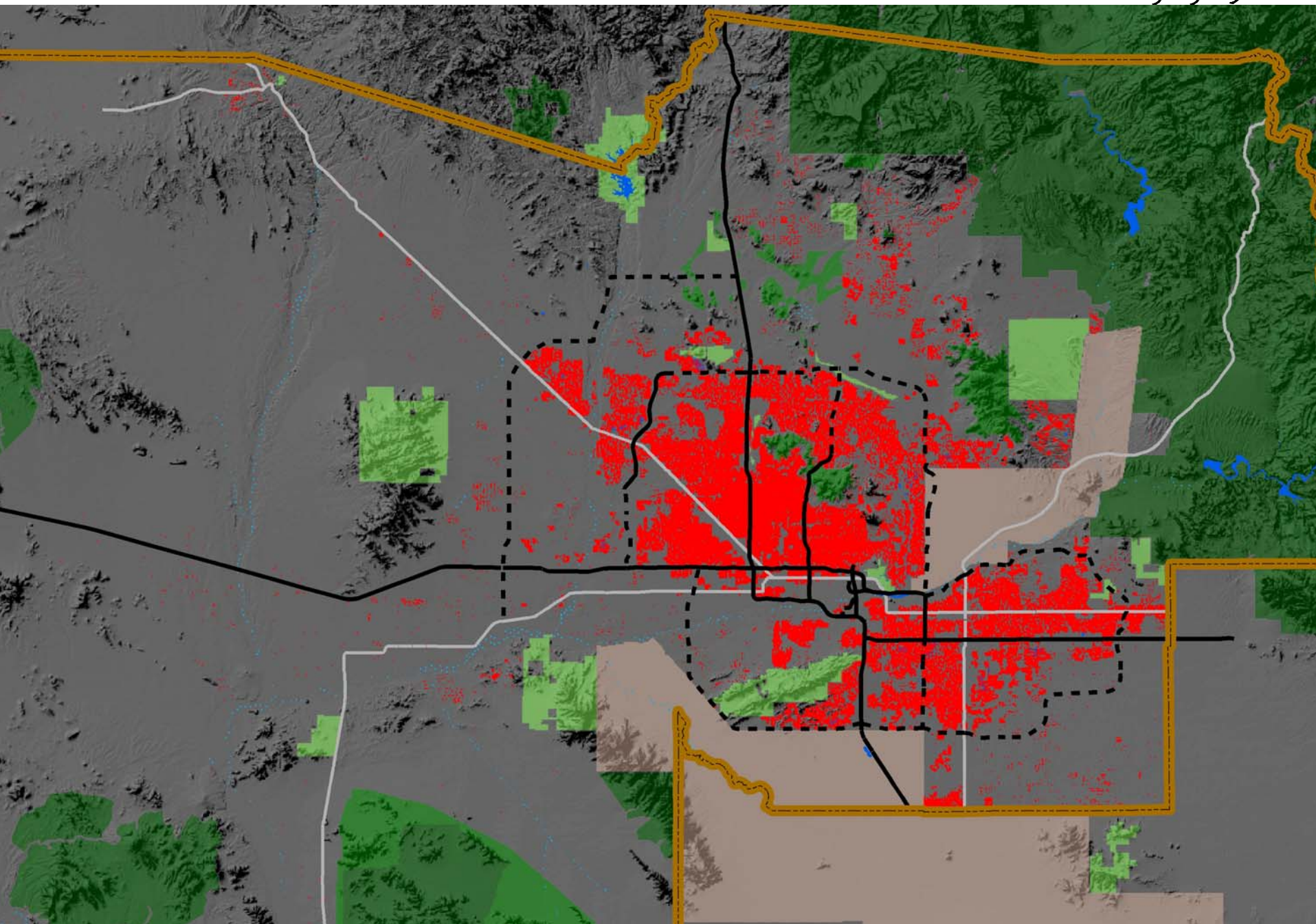

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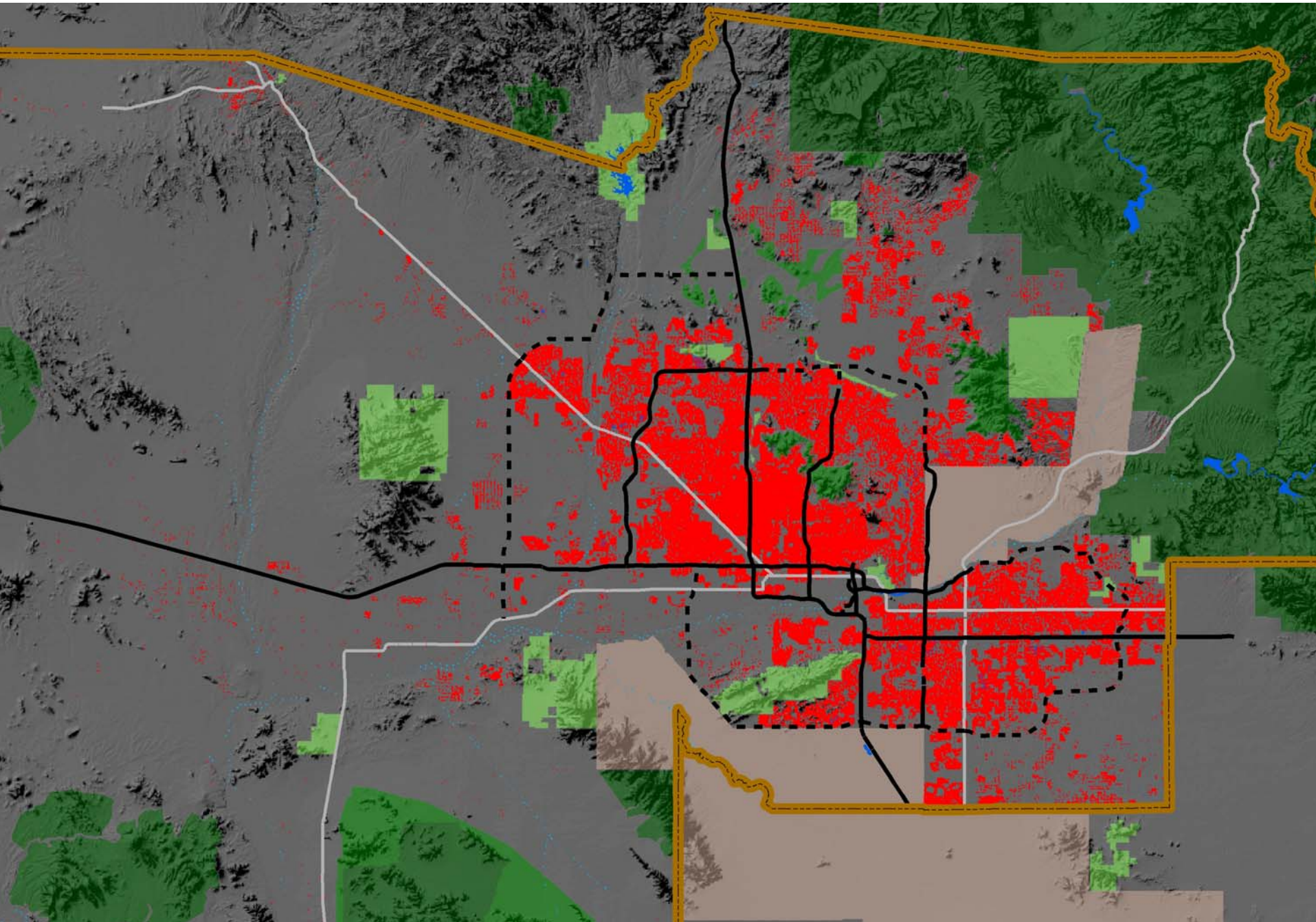

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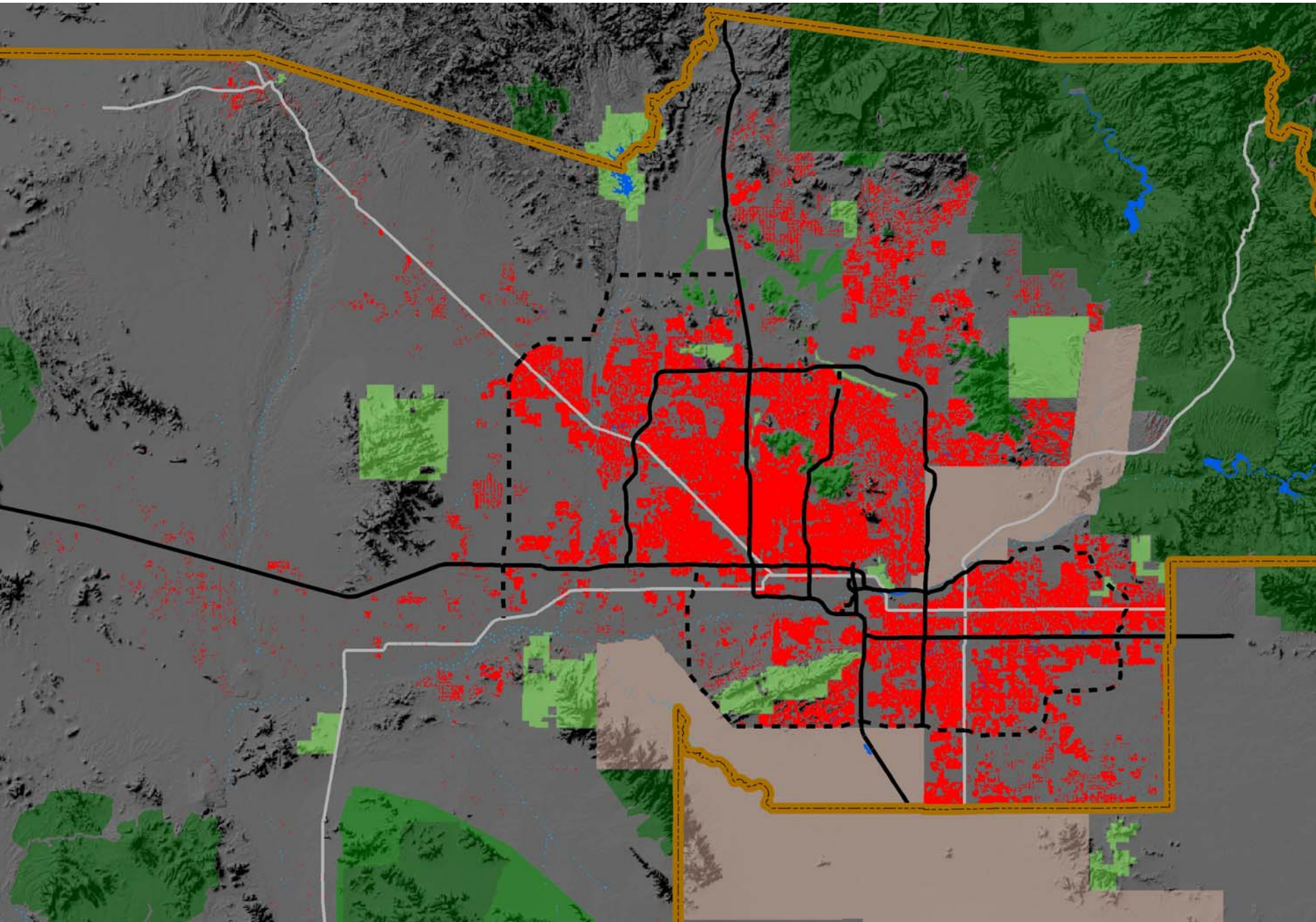

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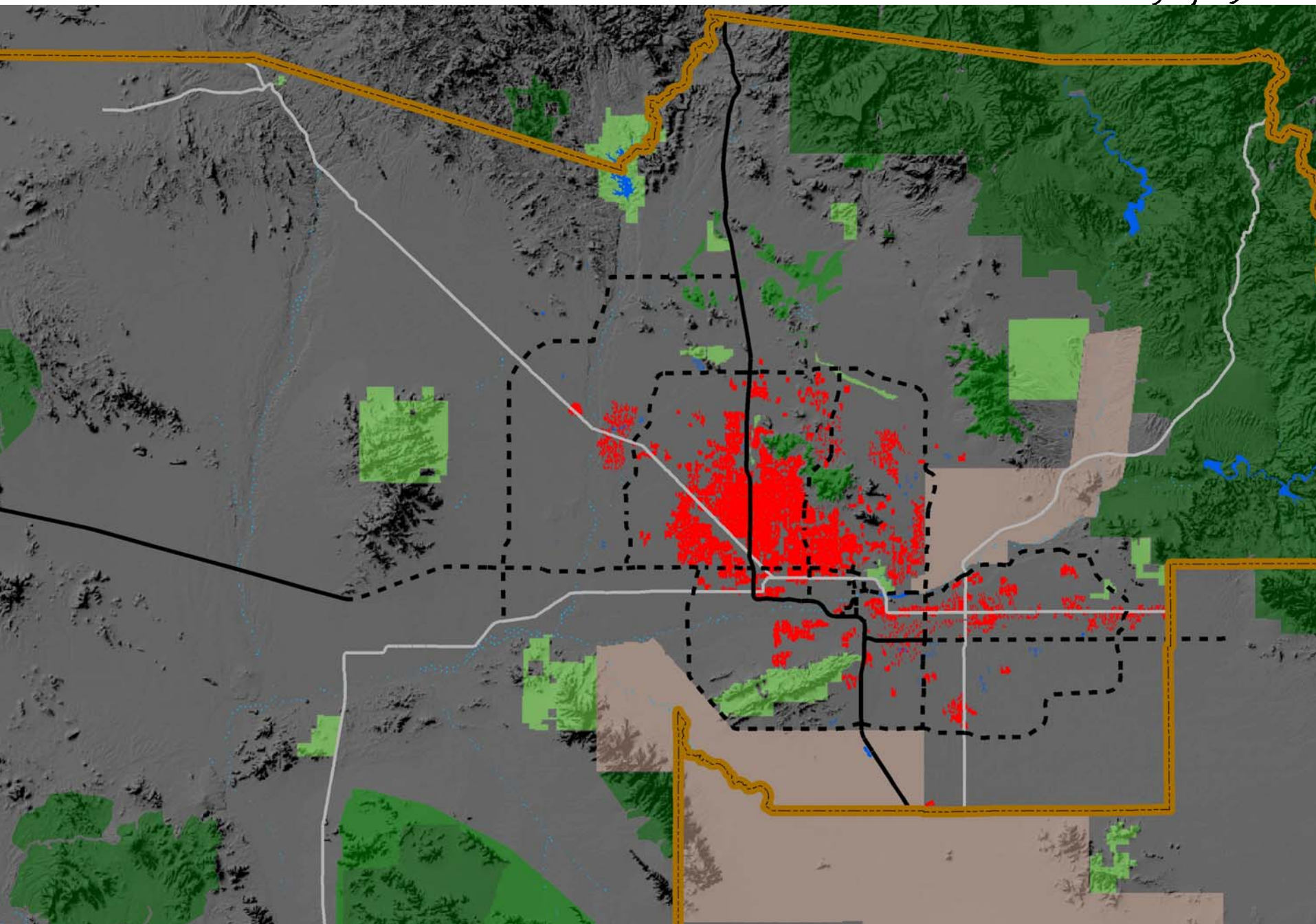

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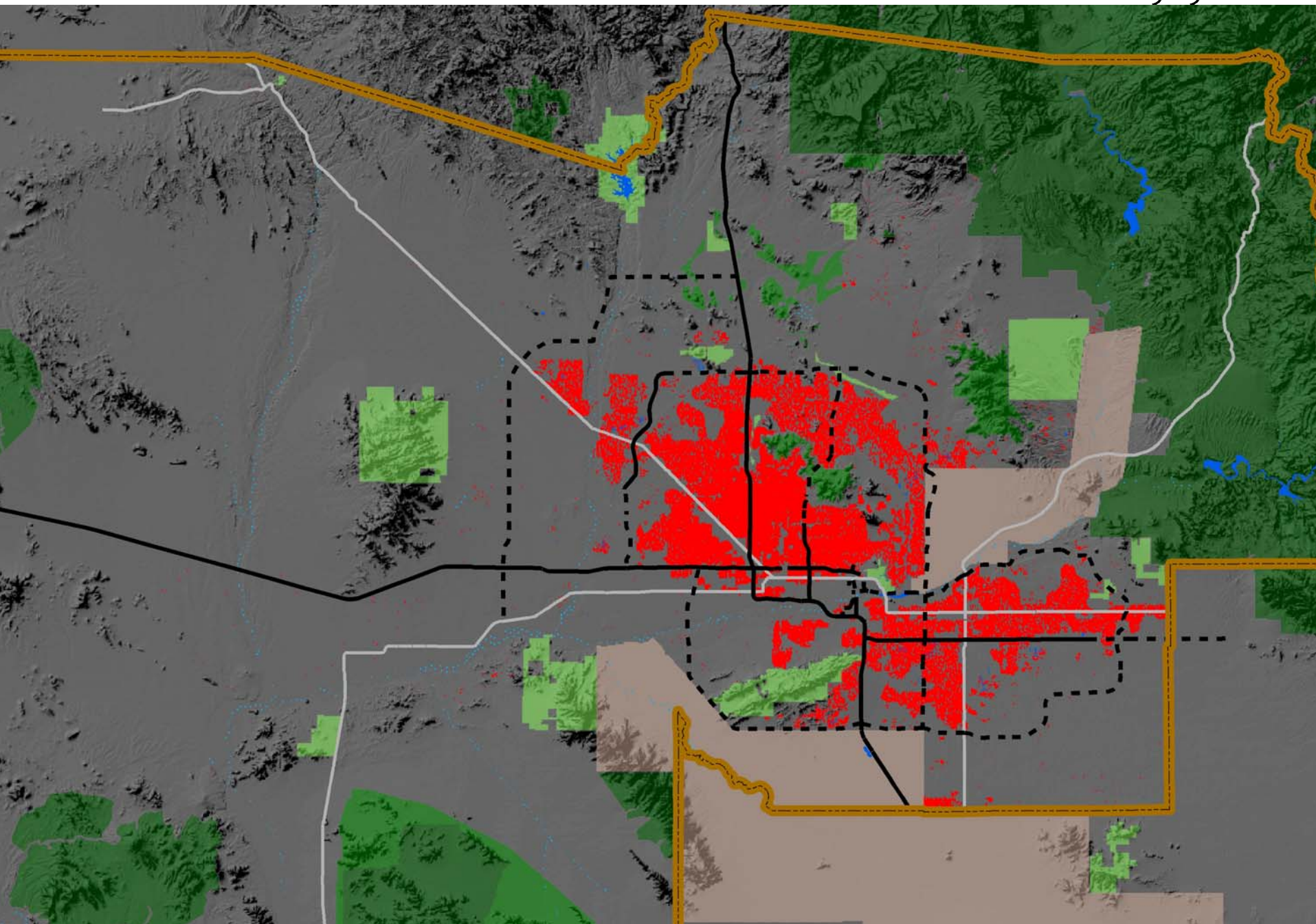

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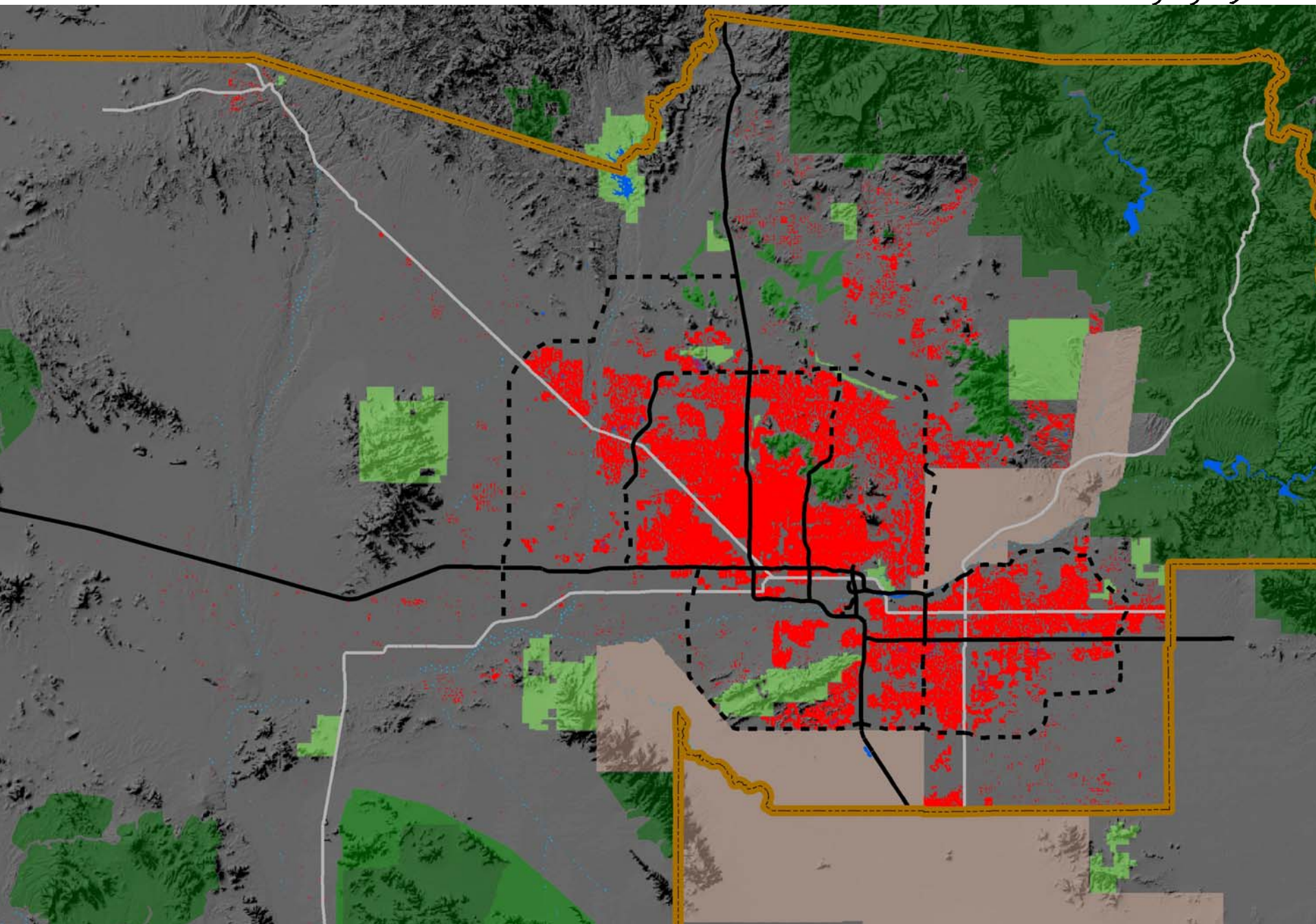

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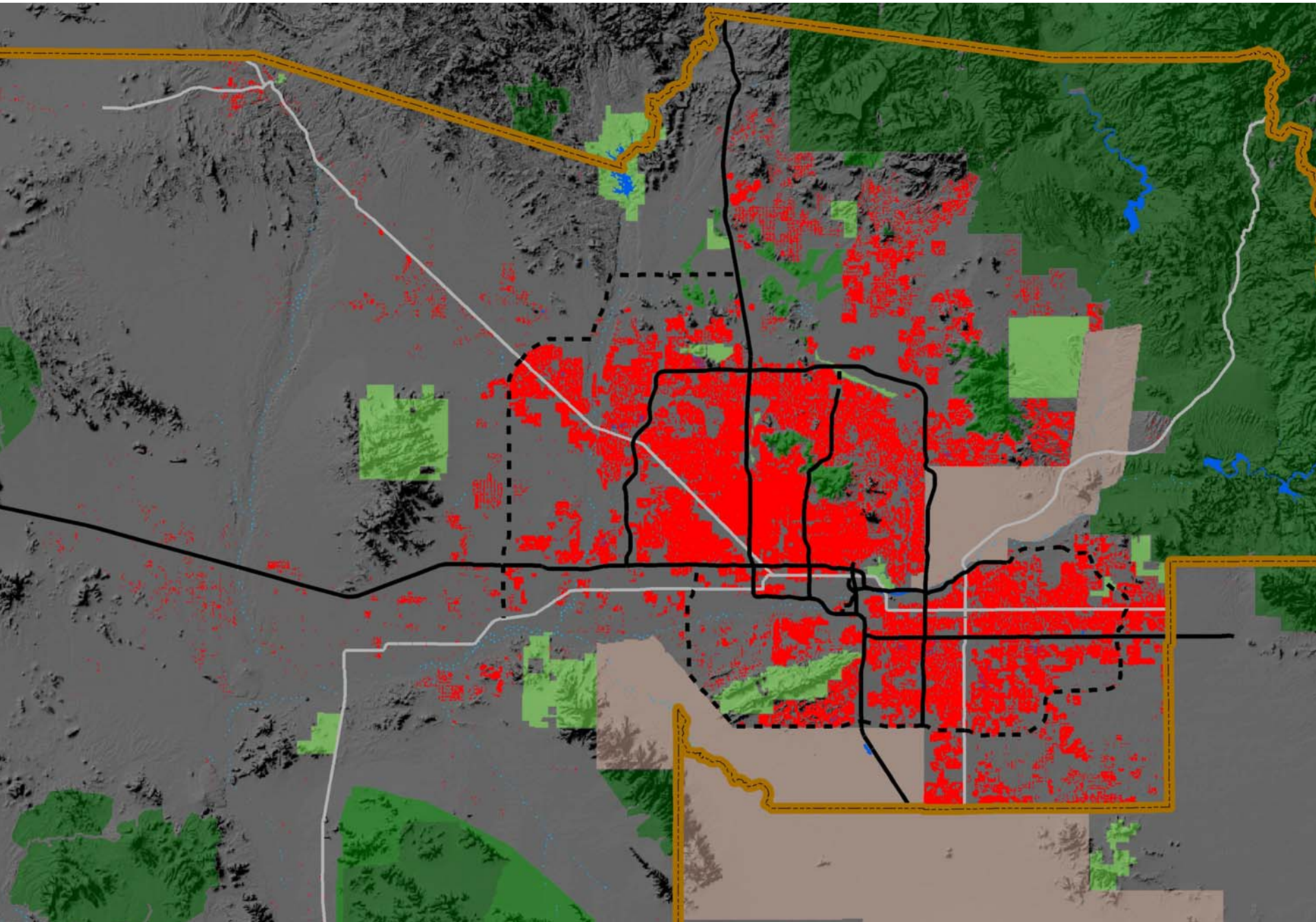

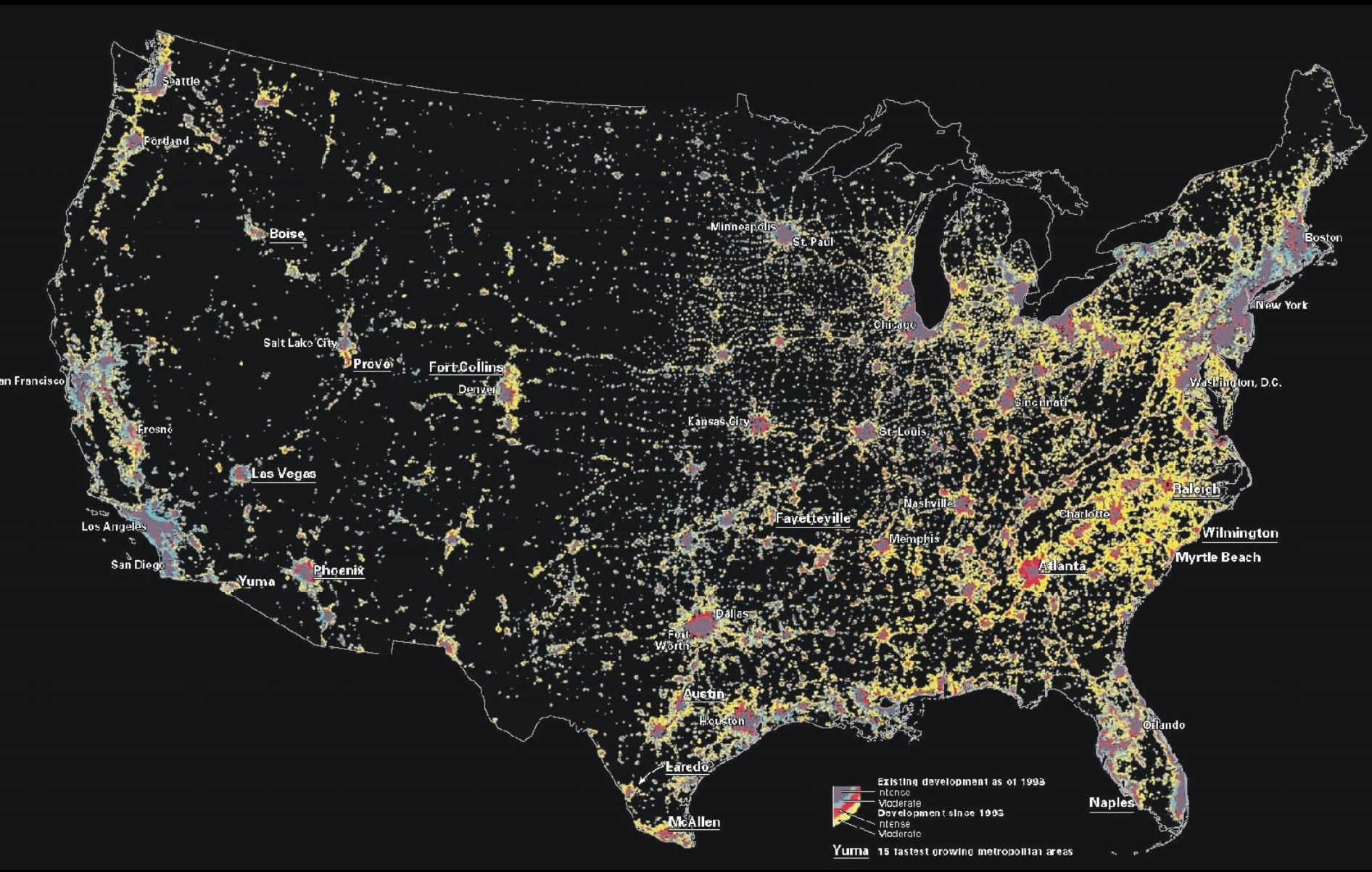
Seattle
Portland
Boise
Minneapolis
St. Paul
Boston
New York
Chicago
Salt Lake City
Provo
Fort Collins
Denver
San Francisco
Washington, D.C.
Cincinnati
Kansas City
St. Louis
Fresno
Las Vegas
Raleigh
Nashville
Charlotte
Fayetteville
Wilmington
Memphis
Myrtle Beach
Los Angeles
San Diego
Phoenix
Yuma
Atlanta
Dallas
Fort Worth
Austin
Houston
Orlando
Laredo
Naples
McAllen
Existing development as of 1993
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Development since 1993
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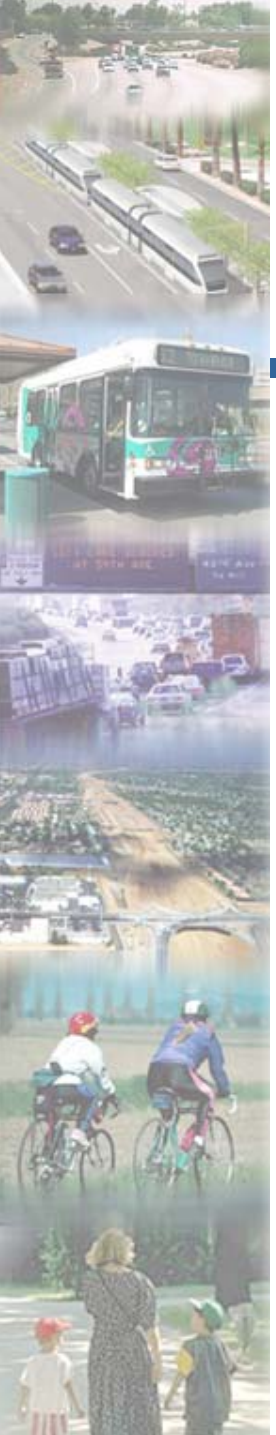
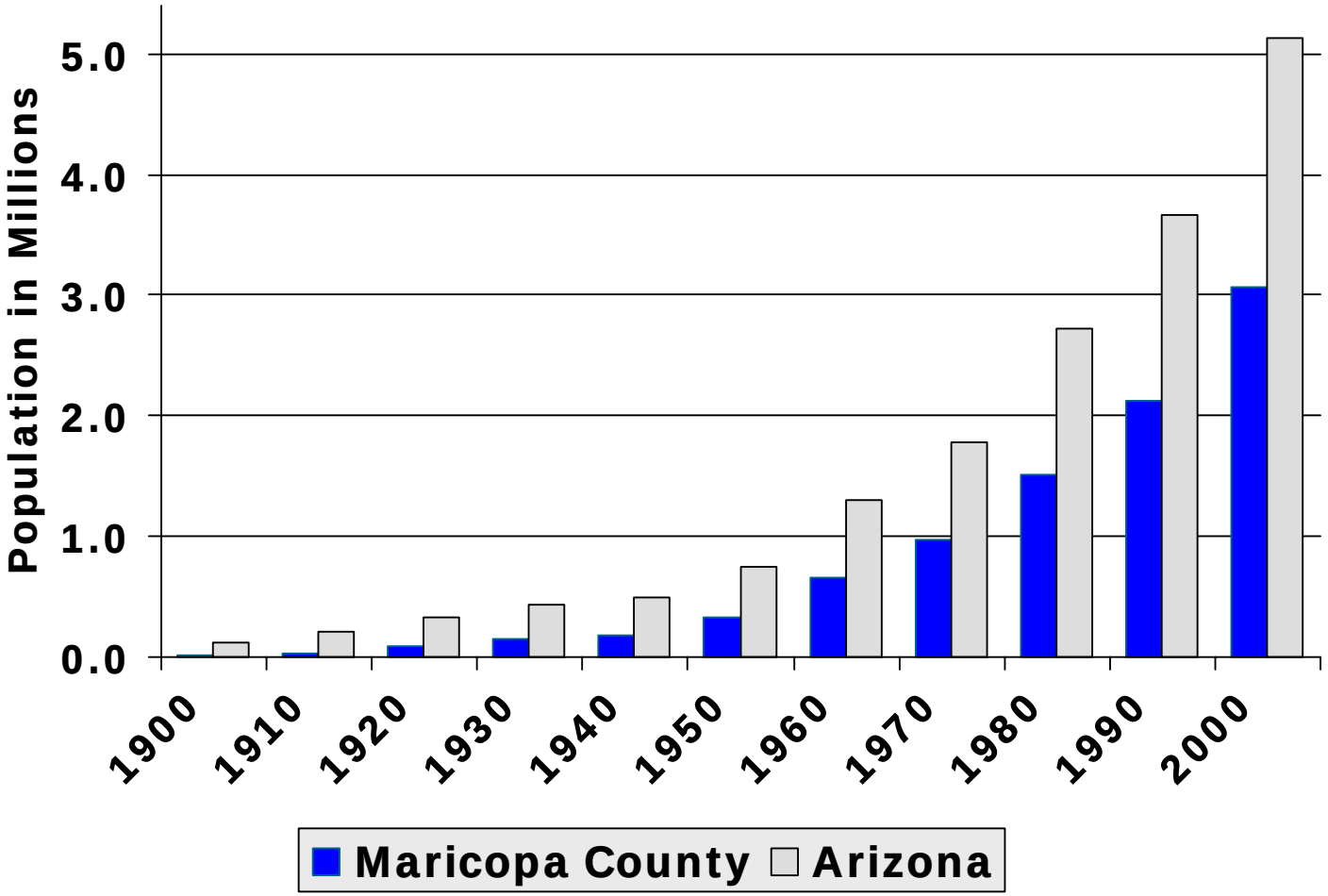
Yuma 15 fastest growing metropolitan areas

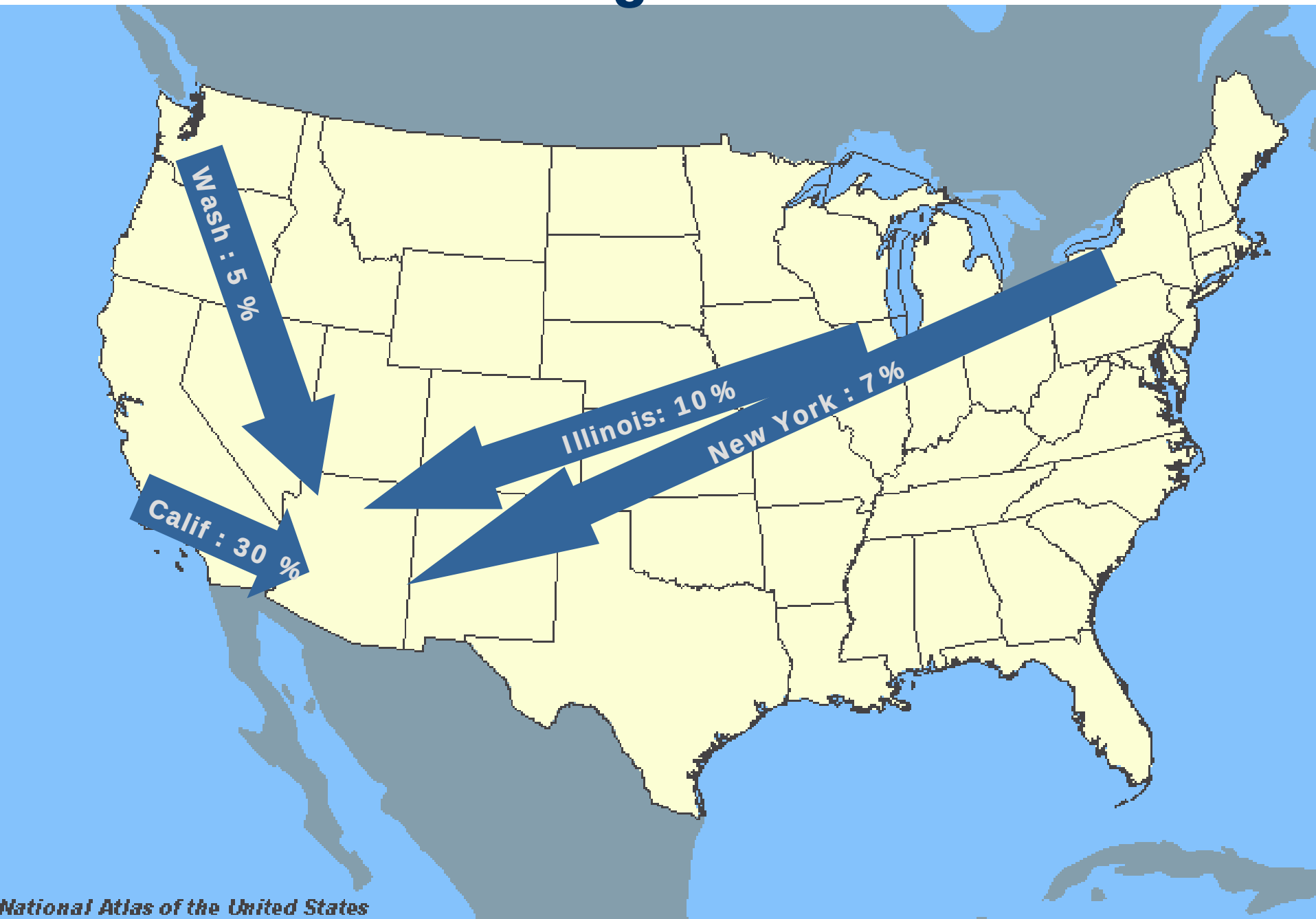

Las Vegas
Los Angeles
San Diego
Phoenix
Yuma

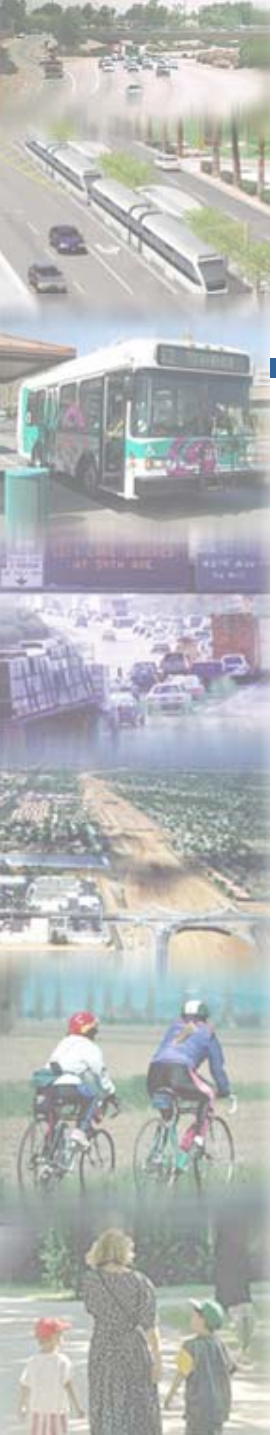


Population Growth in Arizona and Maricopa County

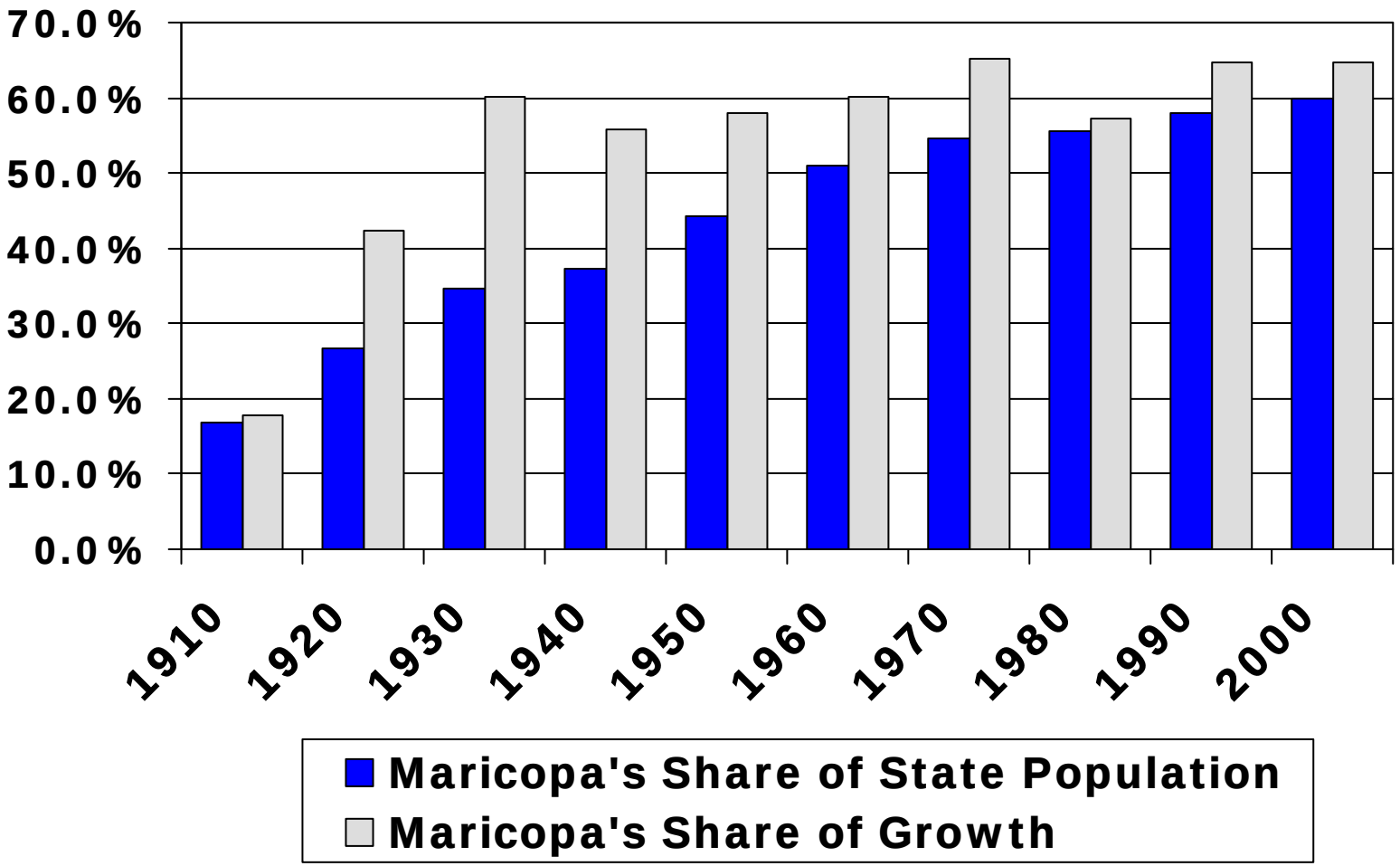


Source of Migrants to Arizona

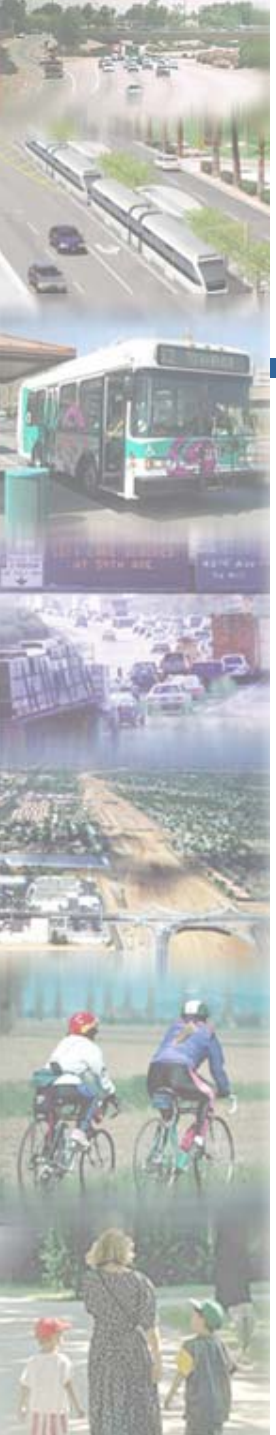




Growth in Maricopa County v. the State

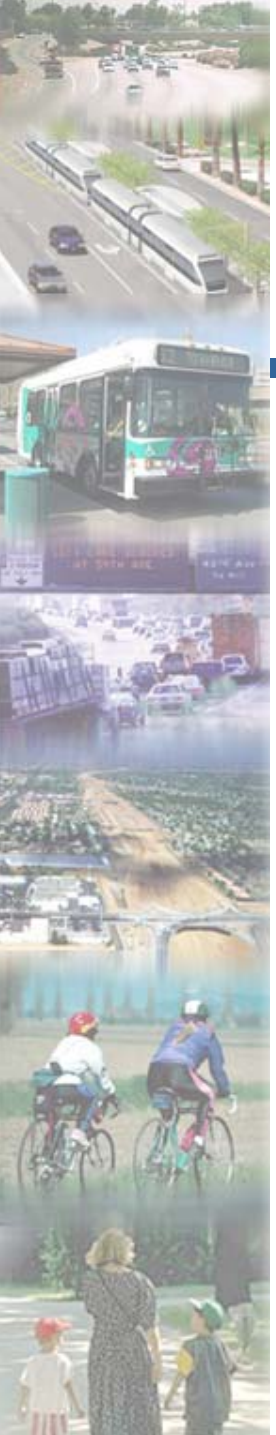


Net Migration out of Maricopa County into other Arizona Counties

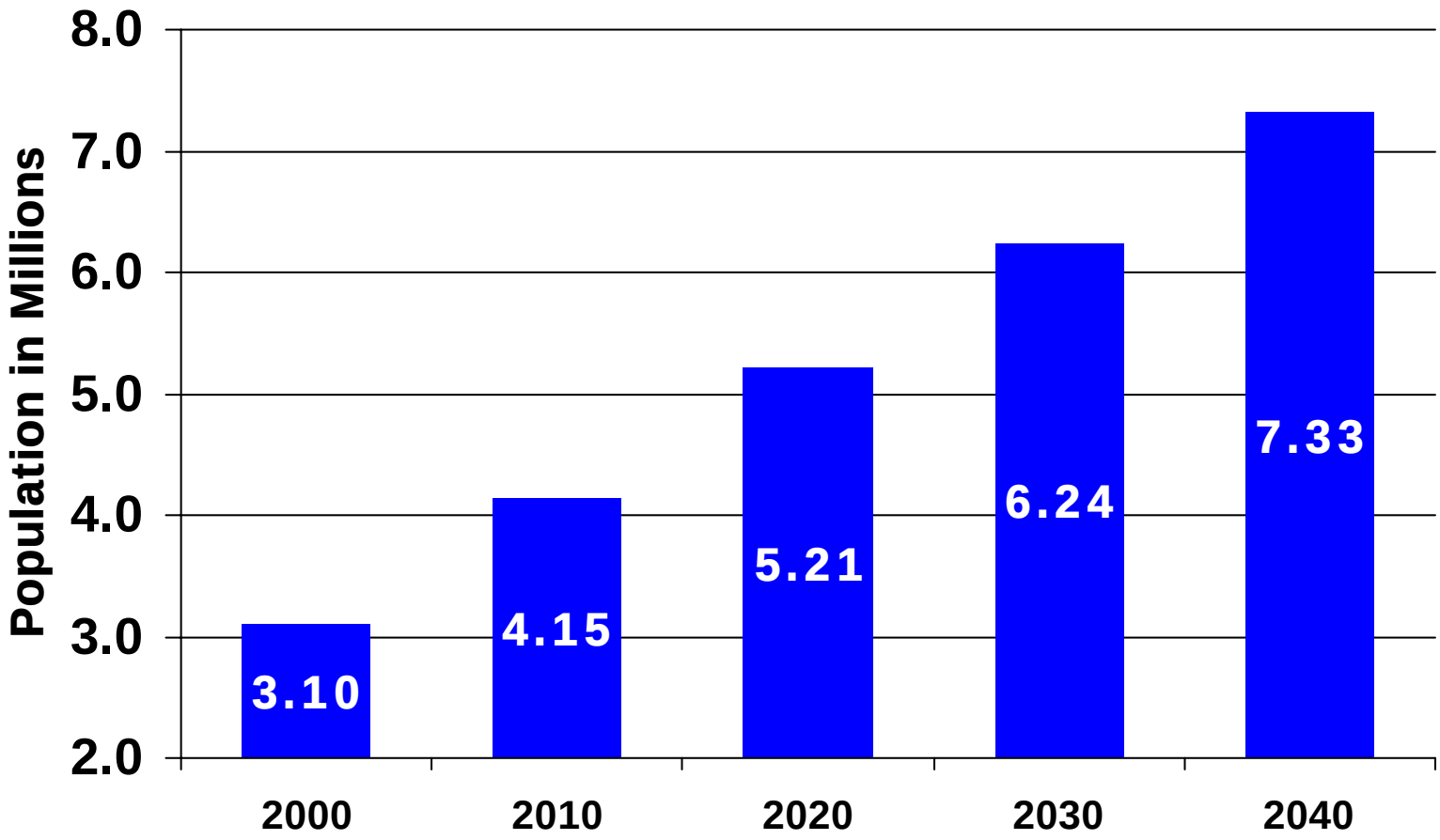


Spillover Growth from Maricopa will increase

- Escape from the “big city”
- Housing affordability
- Retirement
- Communications & transportation links



Maricopa County will continue to grow



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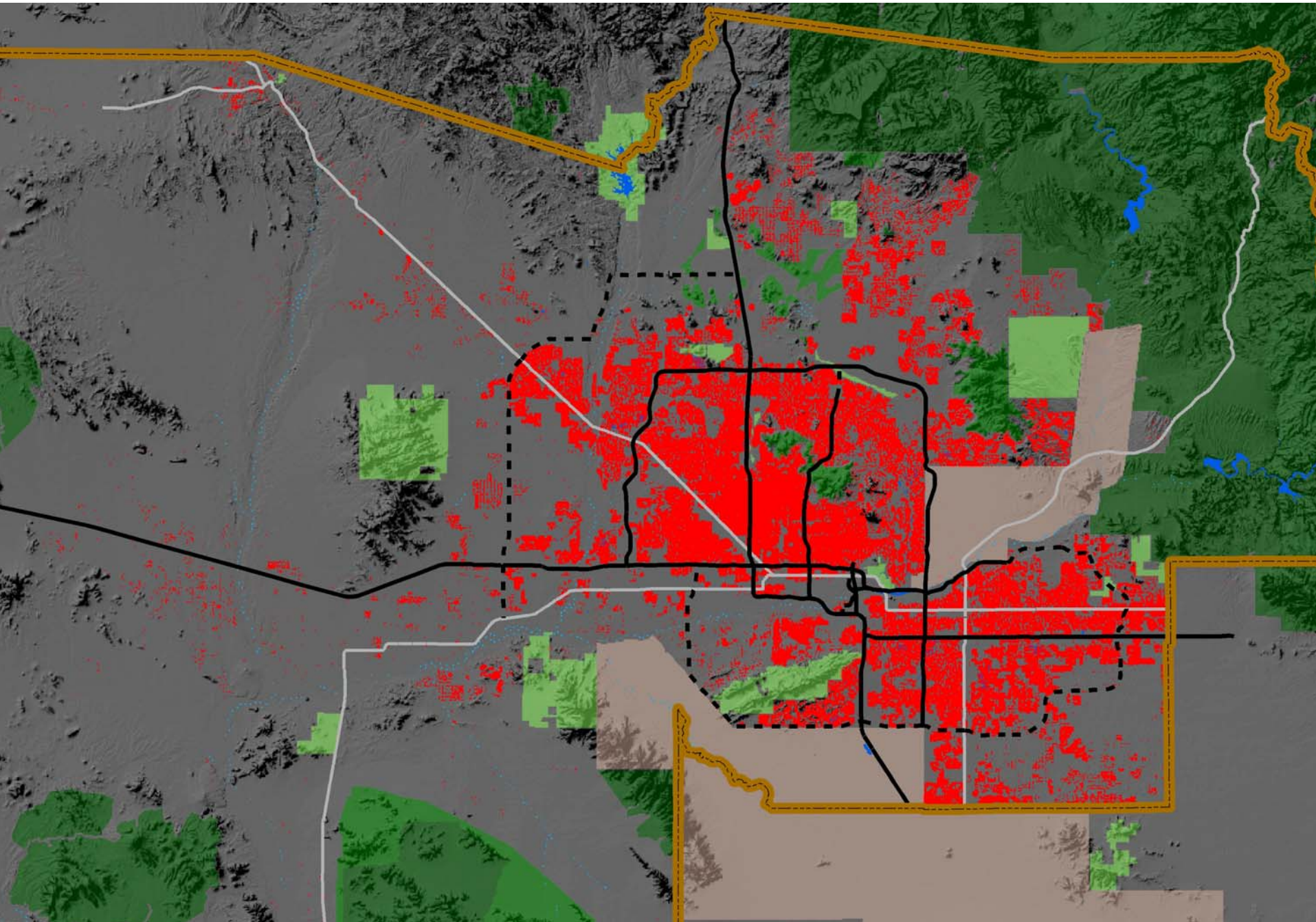
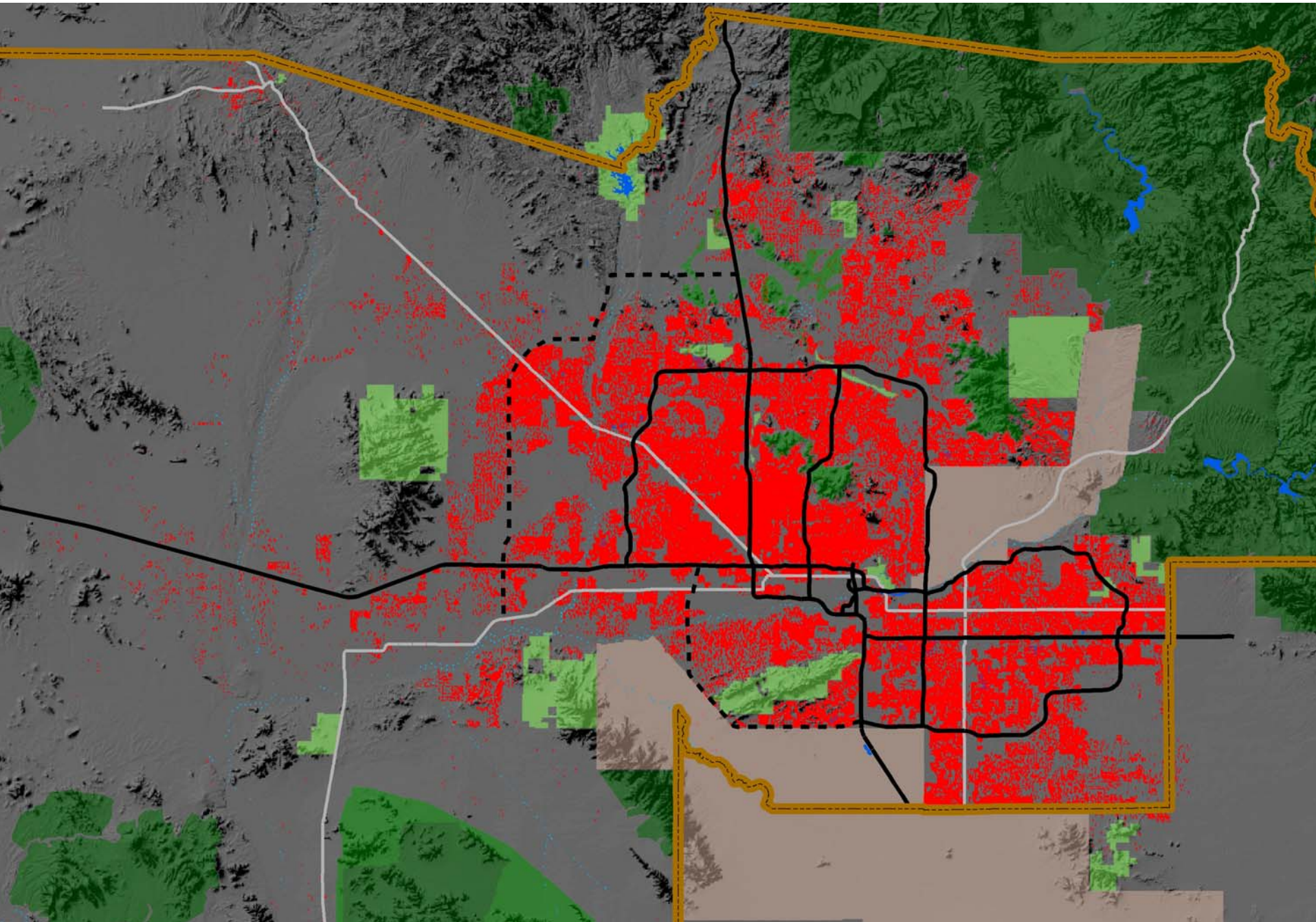


2010



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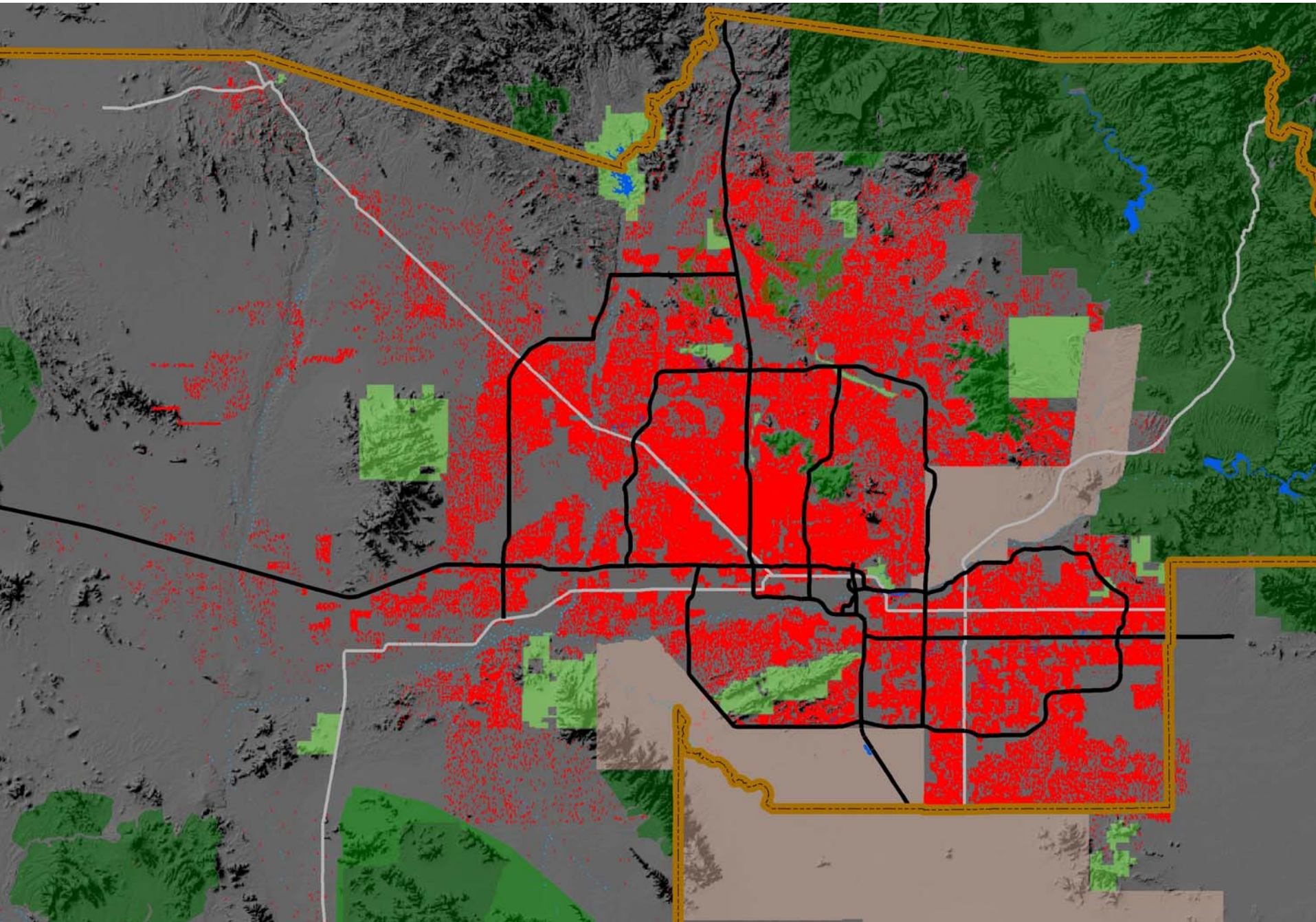

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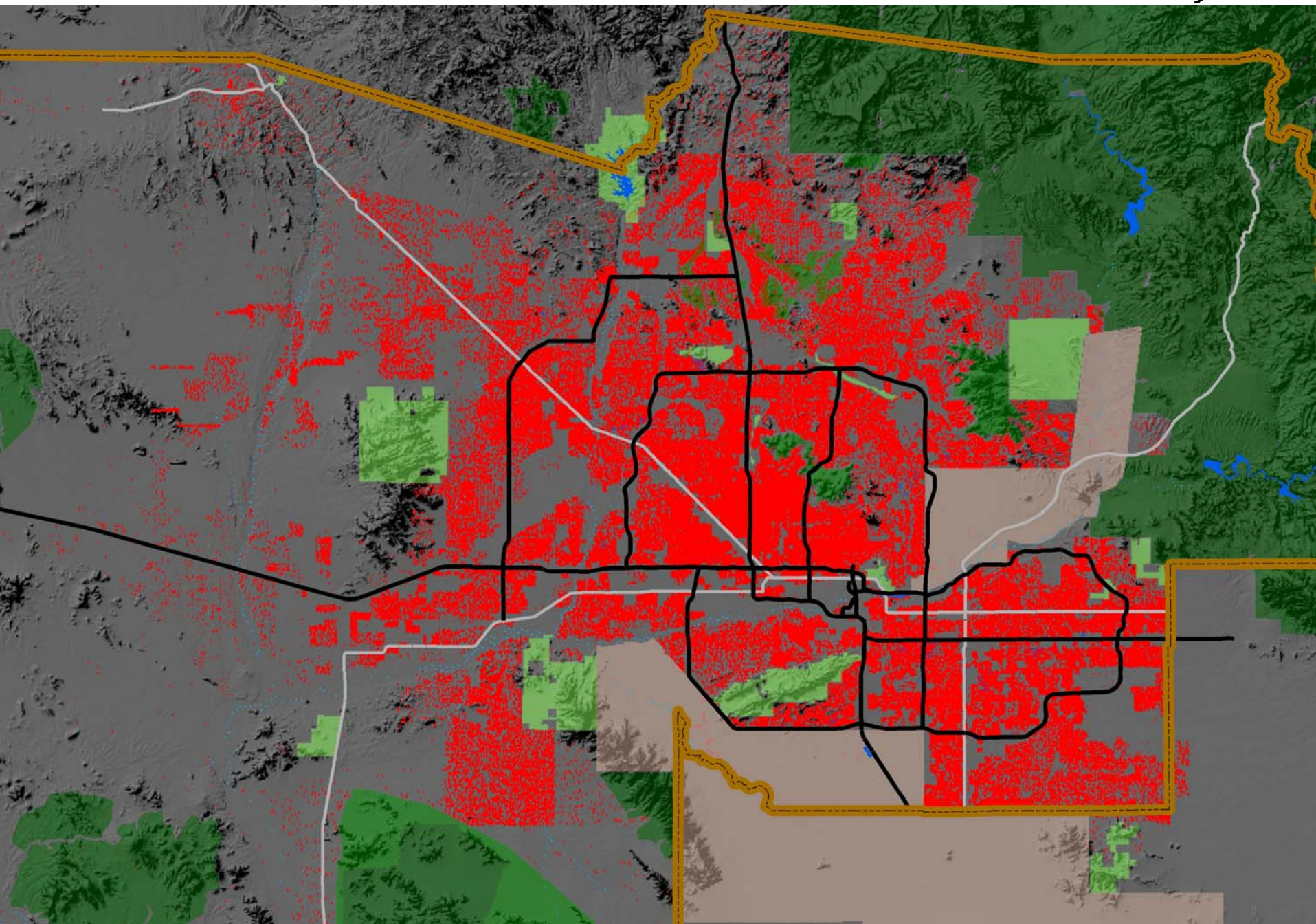
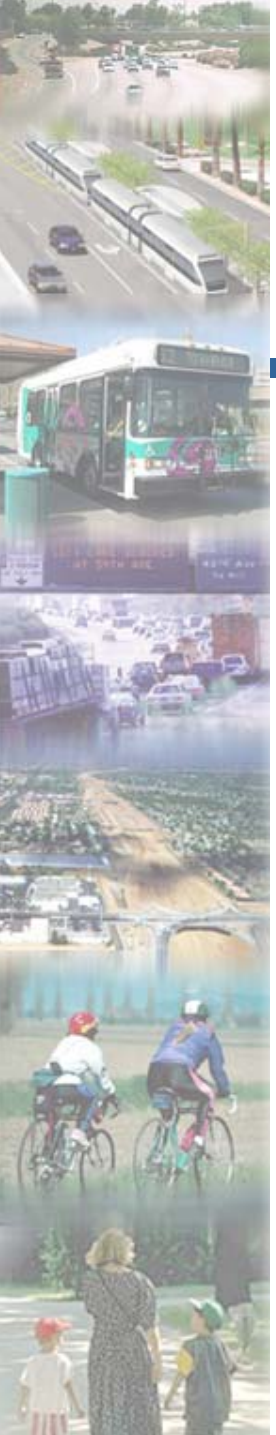
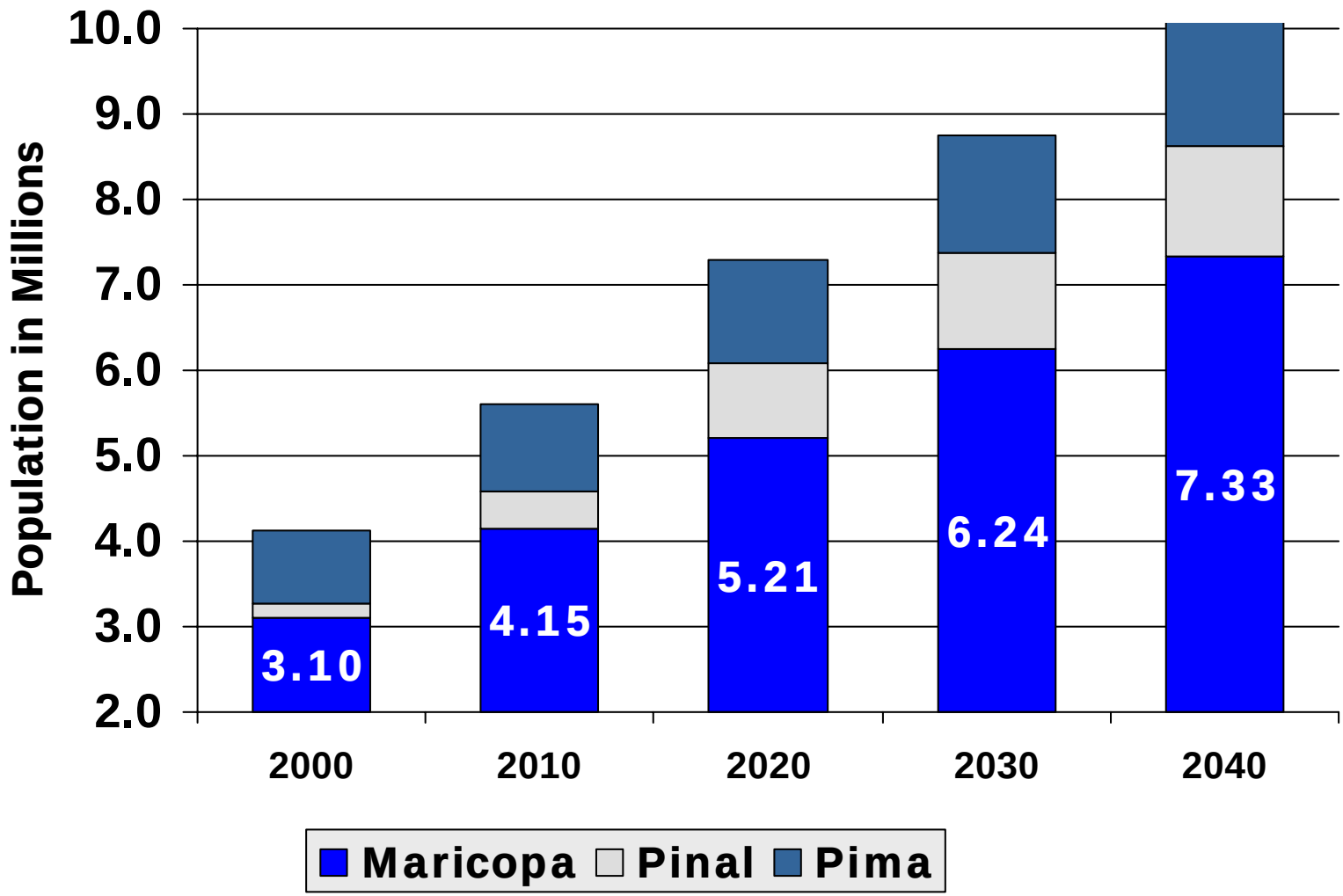
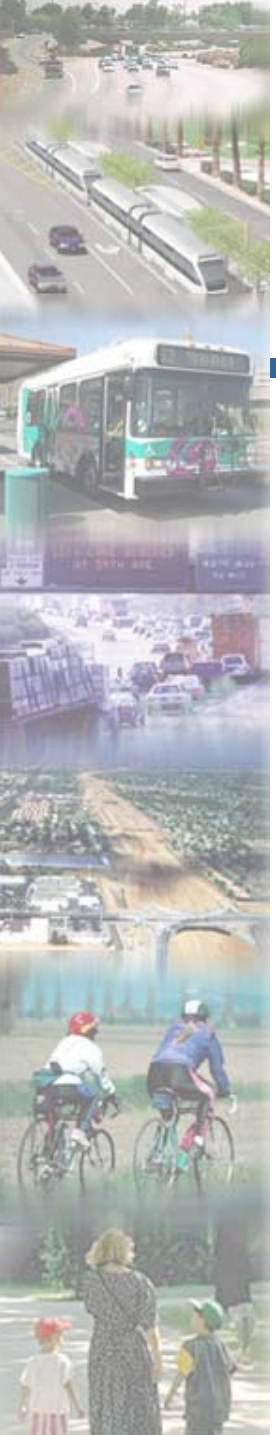




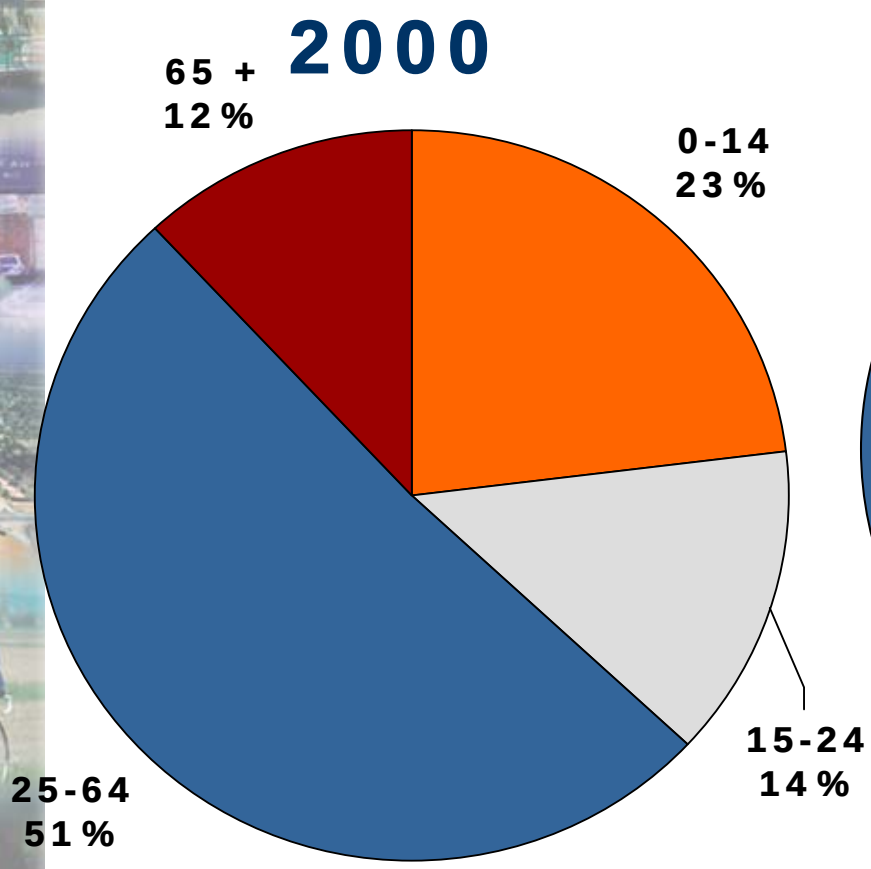
Pinal and Pima will also grow – 10 million by 2040 in 3 counties

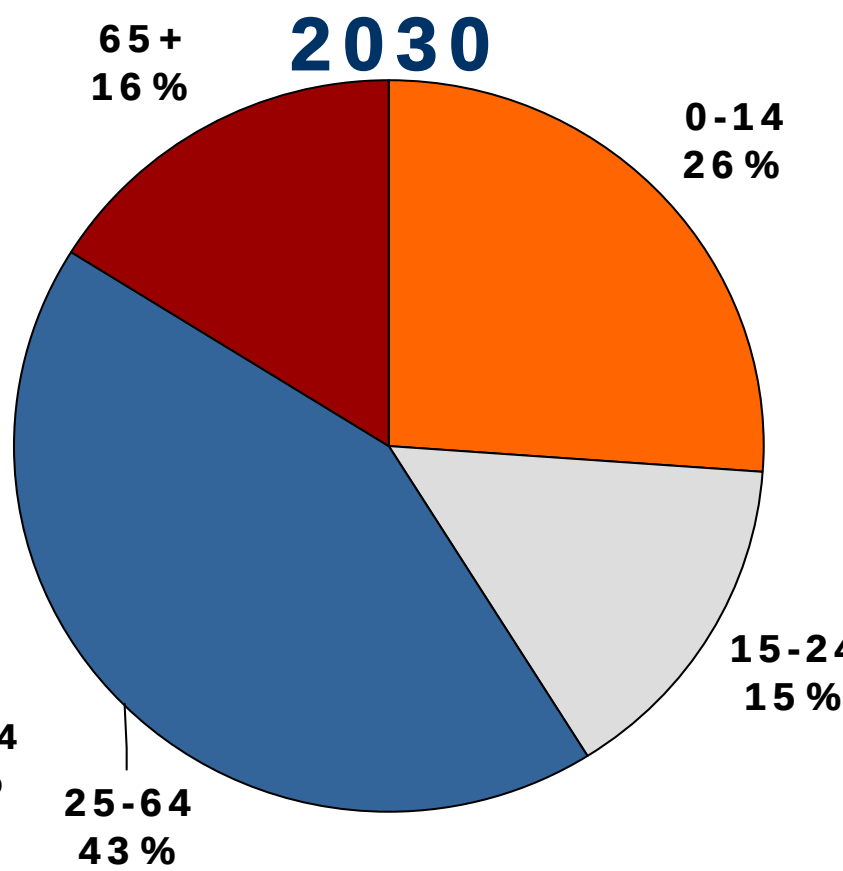


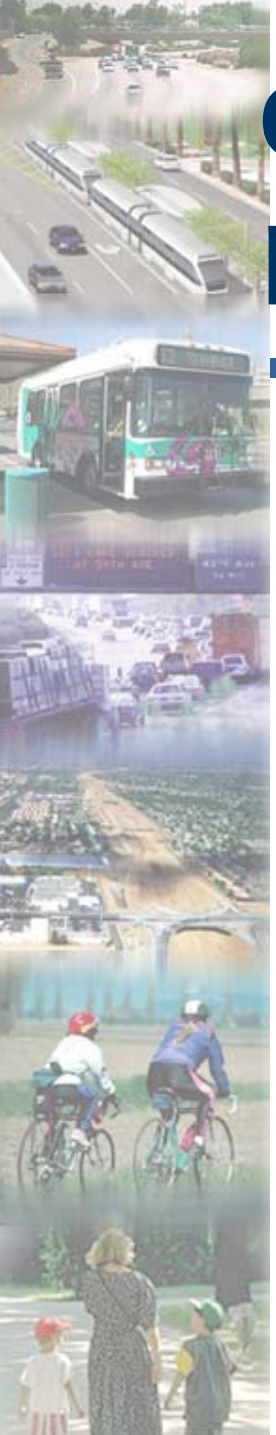


Demographic Trends

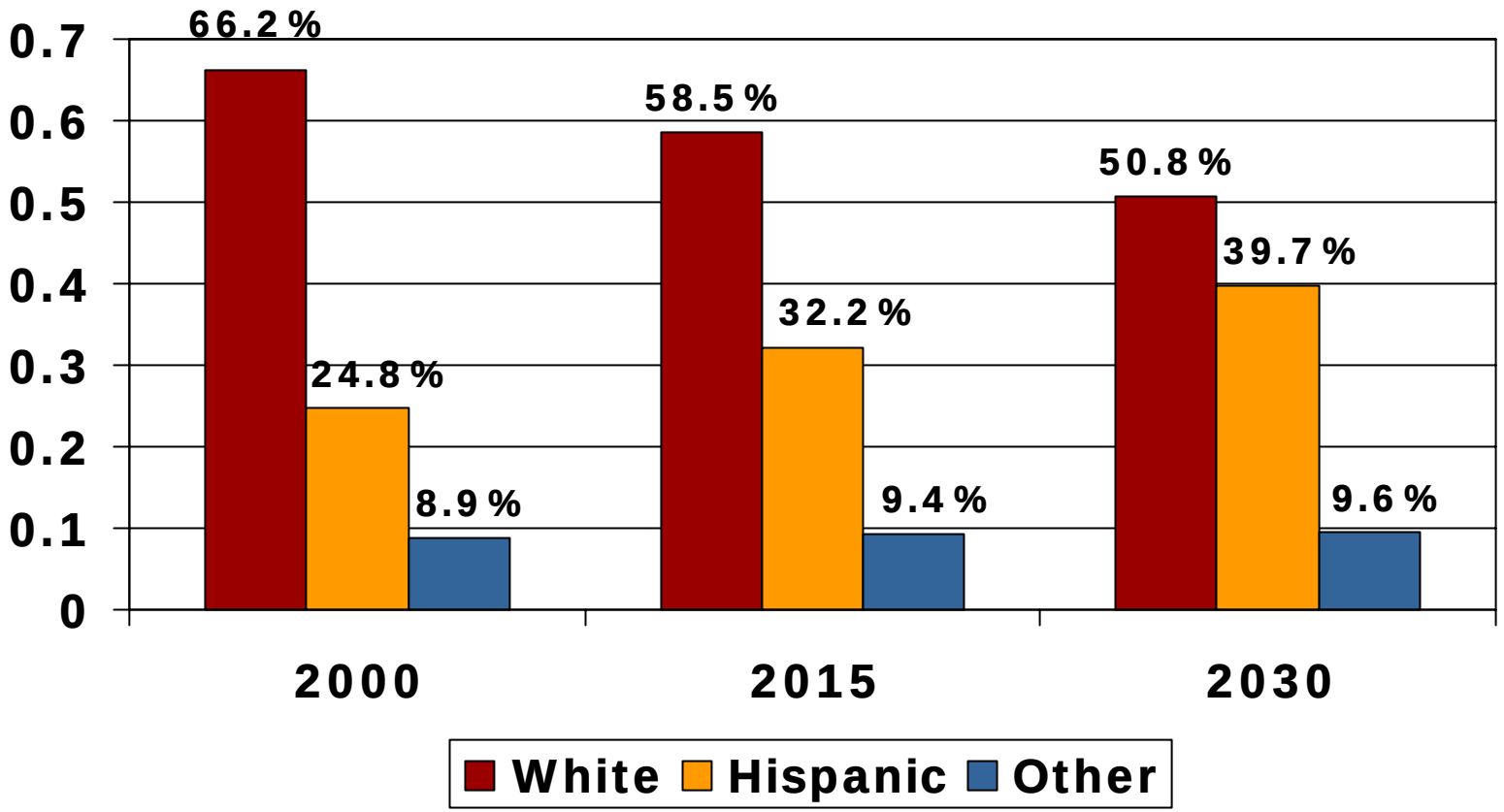
More young and older persons

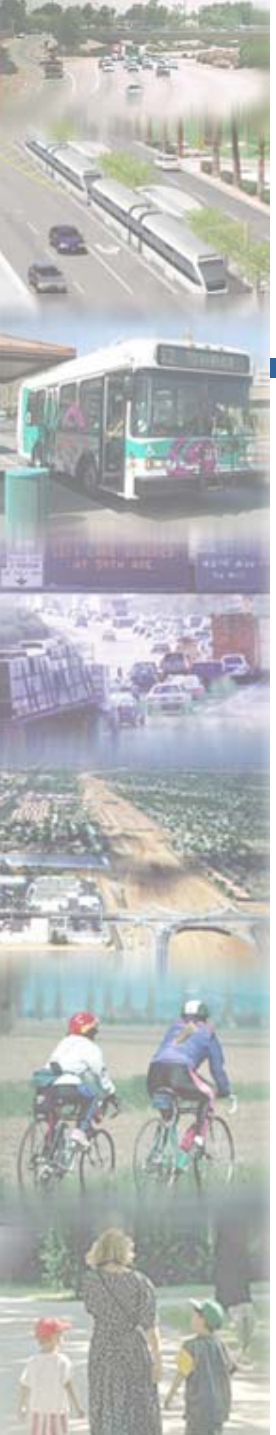






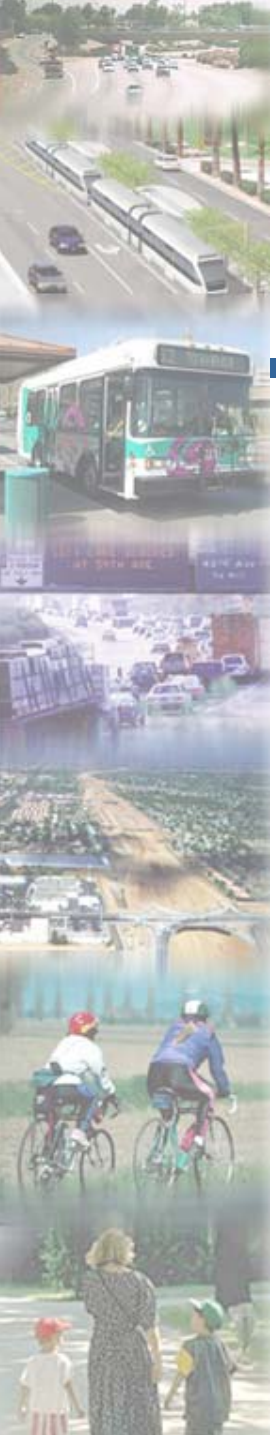
Growing Hispanic population & more diversity





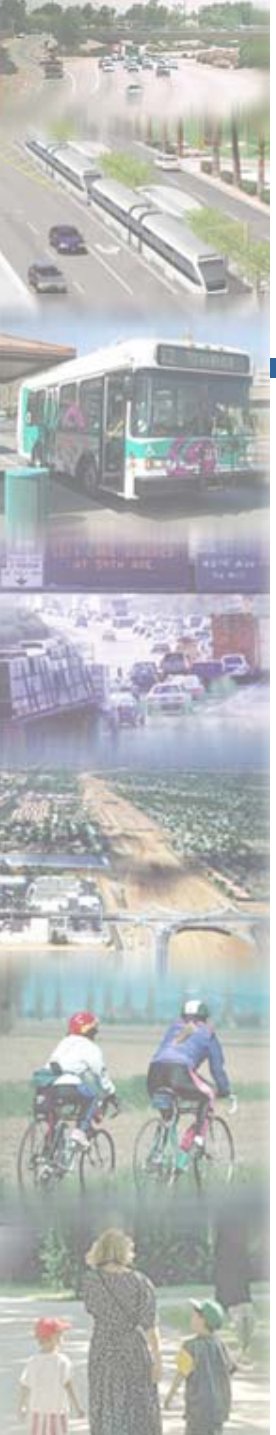
Technological Change

- **Revolutionary** – Advances that fundamentally change what or how we do things.
  - Horse & buggy to cars
- **Evolutionary** – Advances that improve what or how we do things.
  - Model T Ford to the Ford Focus
- **Acceptance** – Determines the rate of change



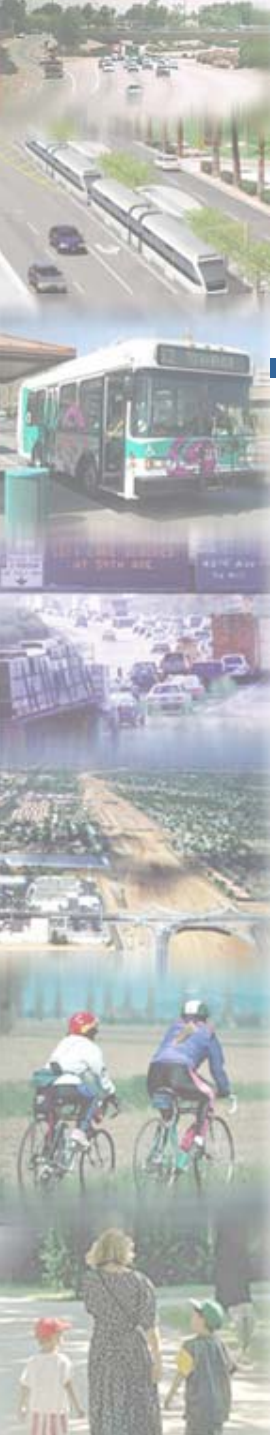
Pace of change is accelerating …

- Telephone: 30+ years
- Automobile: 30+ years
- Radio: 26 years
- Television: 18 years
- Personal computers: 14 years
- Internet: 7 years



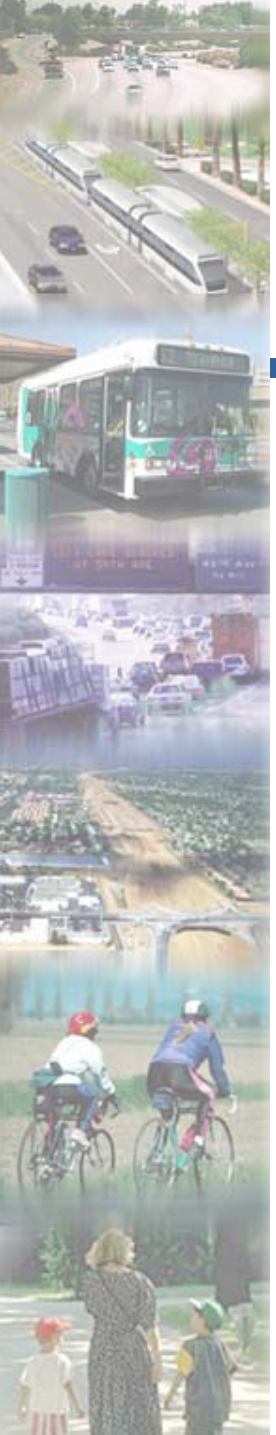
Pace of change

- 1980: Intel 8088 processor – 29,000 transistors
- 2002: Intel Pentium 4 HT processor – 55 million transistors
- If same change applied to air travel from NY to Paris:
  - 1980: 7 hours @ $900 cost
  - 2002: ¼ second @ 1 cent cost



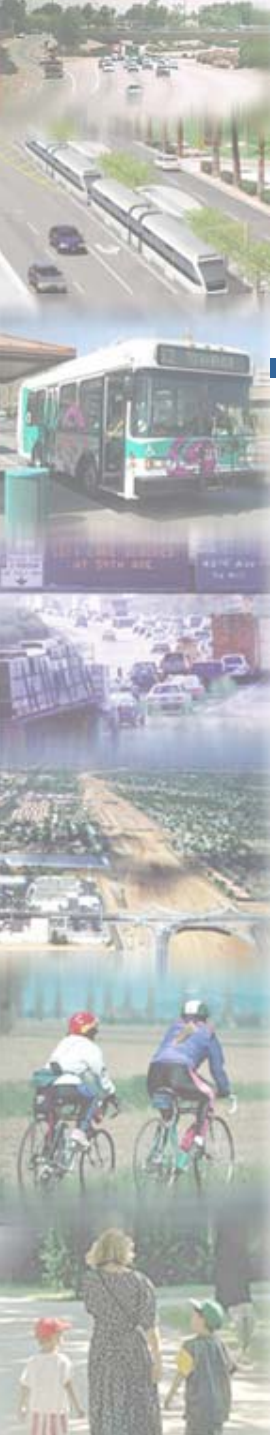
Technology tools for the future

- Computing & Communications
  - Enable all computing devices to communicate and enable all communication devices to compute. Networks
  - Combining computing and communication devices into a seamless system resulting in instant access
- Biotech
  - Genome mapping & biochips
- Nanotech
  - Manipulation of matter at the molecular/atomic level.



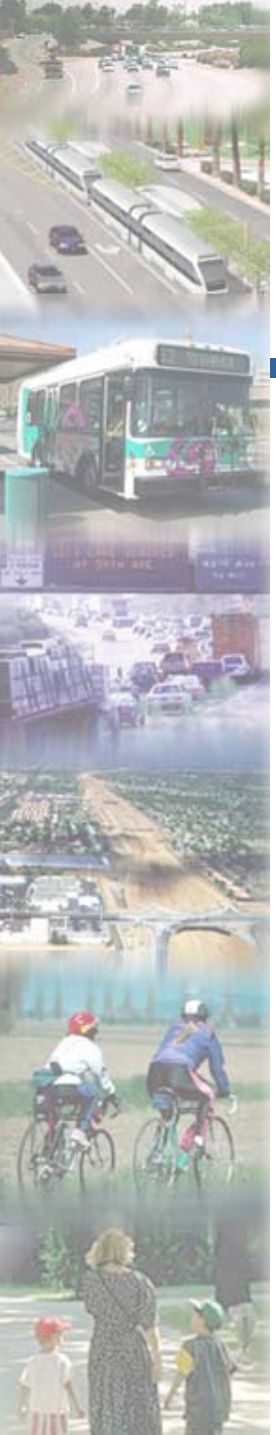
Examples of 21st Century Innovations to Come

- Thinking Computers: Artificial Intelligence
- Smart Chips in Everything
- Robots & Androids
- Predominance of E-Business
- Extending Human Longevity
- The Health Enhancement Business
- Making Products at the Molecular & Atomic Scale
- Space Exploration & Exploitation



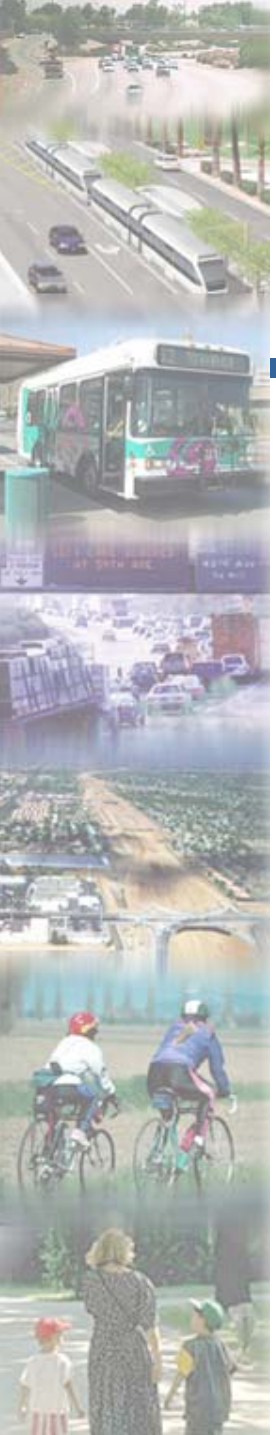
Summary of Future Challenges

- Growing & more diverse population
  - More population outside urban areas
  - More older residents
    - More with mobility challenges
    - More dependence on others
    - Rural areas will have the greatest challenges
- More congestion
  - especially within urban areas
- Integration of technology
  - Lifestyle changes
  - Communications
  - Productivity



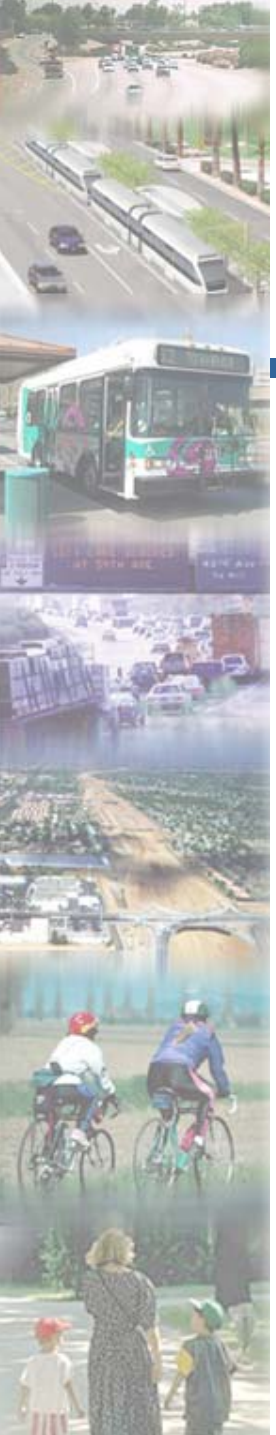
Foundations Needed for a Quality Future

- Education, education, education
  - Reduce dropout rate
  - Integrate technology
  - Emphasis on tools
  - Educating the educators – keeping up with change



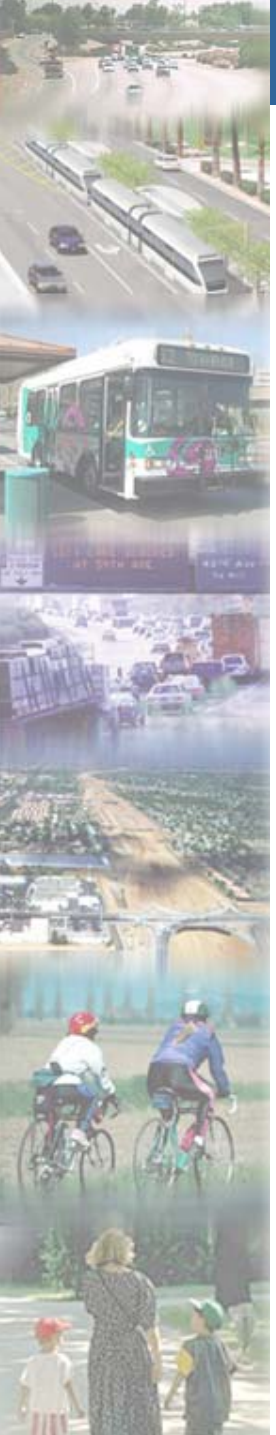
Foundations Needed for a Quality Future

- Encourage Innovation & Commercialization
  - Support Commercialization at Universities
  - Increase available venture capital
  - Support incubators & lab facilities
  - Create environments conducive to innovation



Foundations Needed for a Quality Future

- Emphasize quality of growth over quantity
  - Support Quality of Life assets
  - Invest in good transportation systems
  - Support necessary social services
  - Ensure range of affordable housing
  - Embrace diversity



View of the Valley…

For the times they are a-changin'.

Bob Dylan - 1984

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MARICOPA ASSOCIATION of GOVERNMENTS